

York County Economic Development Plan

Developed through a partnership
between the York County Planning
Commission and the York County
Economic Alliance

2014 Update

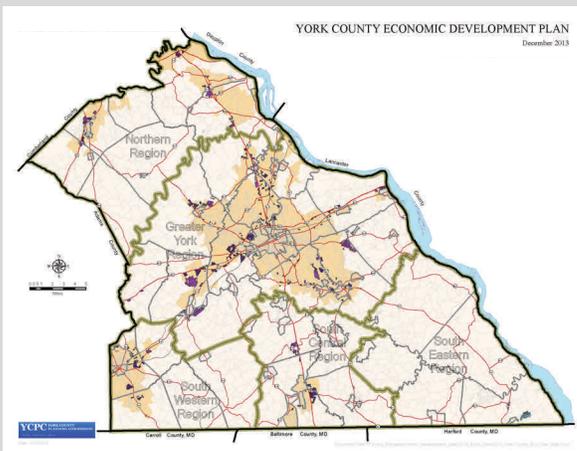


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Executive Summary

York County, Pennsylvania, situated along the Mason-Dixon Line in the south central part of the State, has long served as a center of industry and grown more rapidly economically than other areas in Pennsylvania. The County also offers a high quality of life with a diverse housing stock and variety of recreational offerings, which has made it a desirable location for residential development. Such trends have led to concern that the County needs to sustain its position as an economic center and avoid becoming a bedroom community to metropolitan Baltimore and Harrisburg.

In 2005, the Federal Base Realignment and Closure (BRAC) Commission decided to shift several thousands of jobs from Fort Monmouth, New Jersey, to Aberdeen Proving Ground (APG) in Harford County, Maryland. Since APG is within commuting distance of York County, the BRAC decision increased the need to plan for sustainable economic development in the County.

Prompted by this need, the York County Planning Commission (YCPC) and the York County Economic Alliance (YCEA) joined forces to develop a ten (10) year Economic Development Plan, to serve as an element of the York County Comprehensive Plan. The purpose of the 2009 Plan was to assess the local and regional context, including the potential impact of BRAC, to determine types of growth and target industries suitable for the County and its unique five (5) planning regions, and delineate strategies to pursue such growth and industries. Essentially, the Plan was meant to combine strategies for both comprehensive economic development and growth management.

The Economic Development Plan is coordinated with other elements of the York County Comprehensive Plan in that the Plan builds from the general framework for growth identified in the Growth Management Plan component, which recommends that growth be directed to areas where the full array of infrastructure and services are available. The Economic Development Plan assumes that such areas are relatively more desirable for growth than areas not offering such infrastructure and services. Updates to the Economic Development Plan should therefore coordinate with updates to the Growth Management Plan component and the York County Comprehensive Plan as a whole.

To develop the original York County Economic Development Plan in 2008, YCPC and YCEA engaged Basile Baumann Prost Cole and Associates, Inc. (BBPC) in association with Whitman Requardt & Associates, LLP (WR&A). To complete the York County Economic Development Plan, the consultant team undertook a series of key tasks over a 12 month period, which included technical analyses and public outreach to understand: visions for, critical issues related to, and strategies toward achieving sustainable economic development.

These tasks resulted in the identification of a Countywide vision for economic development informed by the input of a variety of public and private stakeholders, as well as individual vision statements for each of the five (5) planning regions. The Countywide vision included a description of overarching goals for economic development, identification of where such economic growth is desired to occur, and delineation of what type of economic development is envisioned.

These overarching goals included: manage growth and development, conserve rural and scenic areas, and protect agriculture. Diversified manufacturing and industrial uses, a range of retail uses and scales, community/cultural facilities and professional services, small business development and expansion, sustainable agriculture, agritourism, businesses to support agriculture, and recruitment and retention of target industries were identified as desirable. The locations of such economic development were identified as: downtowns, villages and boroughs, existing industrial parks, commercial corridors, and existing growth areas.

The Countywide vision and goals for sustainable economic development are consistent with Pennsylvania's Keystone Principles for growth, investment and resource conservation. The ten (10) Principles, adopted by the Pennsylvania Economic Development Cabinet in 2005, include the following: 1) Redevelop first, 2) Provide efficient infrastructure, 3) Concentrate development, 4) Increase job opportunities, 5) Foster sustainable businesses, 6) Restore and enhance the environment, 7) Enhance recreational and heritage resources, 8) Expand housing opportunities, 9) Plan regionally, implement locally, and 10) Be fair.

An evaluation of current conditions was conducted in order to identify critical issues that must be addressed in order to move toward the stated Countywide vision for economic development. These critical issues included: the aging of the population, the need for a diverse and educated workforce, the need to enhance and market quality of life to attract and retain a skilled workforce, the need to balance residential growth with office, retail and industrial growth, the need to focus growth into downtowns, underused buildings and sites, and corridors rather than greenfield sites, the need to target growth to areas served by infrastructure, the need to provide a clear regional vision, the need to enhance collaboration and coordination of organizations, and the need for more efficient approvals processes.

In order to address these critical issues, as well as work toward the Countywide vision for economic development, a set of strategies was developed in five (5) topic areas: 1) workforce development, 2) growth area strategies, 3) rural area strategies, 4) downtown revitalization, and 5) incentives and economic development.

At the five (5) year mark of the original Economic Development Plan adopted in 2009, the YCPC and the YCEA staff reviewed the Plan's strategies and the progress that has been made to implement them. Through this review process, along with reflection and analysis of the current economy, some existing strategies were modified, some were deleted, and new strategies

emerged. These strategies are described in Chapter IX, Action Plan, of the updated Economic Development Plan. Strategies by topic area (without associated approaches and associated implementation details) are provided below.

Workforce Development Strategies:

1. Workforce Clearinghouse
 - a. Inventory of Workforce Providers
 - b. Workforce Forums with Employers
2. Networks for a Young Workforce
3. Formation of a Public Education Advisory Group focused on Science, Technology, Engineering and Mathematics (STEM)
4. Marketing of and Support for Quality of Life Amenities

Growth Area Strategies:

1. Sample Code Language
2. Corridor Plans
3. Tracking and Monitoring Growth
4. SALDO Plan and Approval Process
5. Infrastructure Planning Considerations

Rural Area Strategies:

1. Information Outreach
2. Strong Local Food System
3. Strong Agritourism Strategy
4. Sustainable Farming Strategy

Downtown Revitalization Strategies:

1. Downtown Economic Development Program
2. Sample Code Language for Downtown Issues
3. Downtown Plans

Incentives & Economic Development Strategies:

1. Expanded Information Outreach on Incentives
2. Education of Businesses and Communities on Target Industries
3. Renewable Energy Incentives
4. Expanded Sites Database

The implementation of these strategies and associated approaches will continue to be led by YCEA and YCPC working in cooperation with partners at the local, County, regional, and State levels. The strategies are meant to be tailored over time to respond to changing needs and conditions. The York County Economic Development Plan will therefore serve as a dynamic guide and a living and changing document to work toward the desired outcomes established in the Countywide vision for economic development. The Plan will be reviewed annually by YCPC and YCEA, and will be used by each of these entities as a planning and economic development strategy guide to formulate future policy and action.

Chapter I Introduction

1.1 Definition of Sustainable Economic Development

York County, Pennsylvania, strategically situated between Harrisburg, Philadelphia, and Baltimore, already offers the underpinnings for healthy economic development. The County is blessed with a diverse mix of industries, is linked via major transportation networks to major metropolitan markets, boasts a workforce credited for its strong work ethic, offers attractive housing options, and touts unique agricultural and architectural heritage. These core strengths have enabled the County to grow in terms of both industry expansion and the attraction of new residents.

The challenge for planners and economic developers is to identify how to effectively manage growth in order to maintain a sustainable course for economic development. To better understand this challenge, a definition of sustainable economic development has been prepared as a result of conversations with County planners and economic developers, business and community development stakeholders, municipal officials and members of the general public. The definition, which covers multiple components, is described in Exhibit 1-1.

Exhibit 1-1: Definition of Sustainable Economic Development
• Diversifies the economic base
• Enhances York County’s competitive position and image regionally, nationally, and even globally
• Balances jobs, housing, and services, providing current commuters with opportunities to work near home in the future, and providing residents with retail goods and services
• Builds from and preserves quality of life assets such as culture and history
• Attracts high-quality, high-paying jobs, particularly in emerging industries
• Expands the base of industries working in renewable energy development
• Capitalizes on local agricultural industries with “buy fresh buy local” initiatives
• Supports public transit initiatives
• Focuses non-rural development away from prime farmlands that could be used for agriculture
• Builds from the County’s dedicated workforce with its strong work ethic
• Occurs in part as a result of clear, coordinated, effective, and efficient economic development and workforce development programs

1.2 Purpose of Plan

The purpose of the York County Economic Development Plan, a joint effort of YCPC and YCEA, is to assess the local and regional context, determine types of growth and target industries suitable for the County and its unique five (5) planning regions (which include a variety of sizes of downtowns, suburban areas, and rural communities), and delineate strategies

to pursue such growth and industries. Essentially, the Plan is meant to combine comprehensive economic development strategies and growth management strategies. Overarching goals of the Plan include:

- Retaining existing business and industry
- Attracting new business and industry
- Identifying locations of new business and industry
- Exploring and assessing critical issues affecting economic development and growth management

The York County Economic Development Plan will serve multiple purposes to work toward these goals. The Plan will be included as a component of the broader Comprehensive Plan for the County maintained by YCPC, which will allow the YCPC to continue working with municipalities to develop consistencies between their Plans and the County's Plan for economic development. For YCEA, the Plan will serve as an action document for future efforts. The YCEA will use the Plan when approaching the State for assistance on project implementation aspects, such as infrastructure, and the Plan will help YCEA determine where to focus limited public resources.

For municipalities interested in economic development, the Plan will help YCEA counsel individual municipalities regarding their competitive strengths against the broad County backdrop.

In addition to the many purposes the final Plan will serve, the process of creating the Plan has served several functions. The municipal and public involvement process, which included meetings with officials and community members, has offered an opportunity for the County and municipalities to collaborate and understand how the County can assist municipalities in reaching their economic development goals.

1.3 Original Steering Committee

The original Plan was informed by the insight of distinguished individuals on the Steering Committee, which met periodically to lend ideas and comments on the technical work that was conducted to produce the 2009 Plan. Individuals that lent their time and expertise through the Steering Committee included the following:

1. Chris Reilly, County Commissioner
2. Felicia Dell, YCPC Director
3. Darrell Auterson, YCEDC President and CEO
4. Representative Stan Saylor, 94th District, primary BRAC impact district constituent representative (Jo Anna Shovlin)
5. Senator Michael Waugh, 28th Senatorial District, County constituent representative
Christopher Naylor

6. Patrick Fero, YCEDC Board Member, Municipal Representative
7. Laurel Wilson, YCIDA Board member, Municipal Representative
8. Joe Musso, York City Council, planner
9. Duane Stone, Dillsburg Business Association, attorney
10. Tom Donley, York County Chamber of Commerce, business community representative
11. Bruce Miller, SEDCO Board member and farming community representative
12. Brad Hittie, TrueValue-Plus, Southern York County business community representative
13. Andrew Stern, York City, Consultant

1.4 Public Involvement & Participating Stakeholders

In addition to the insight of Steering Committee members, the 2009 York County Economic Development Plan was guided by the involvement of municipal officials, individual stakeholders from the business and community development fields, and members of the general public. The purpose of public involvement for the project was to inform stakeholders and the general public and obtain input at important points throughout the process.

Opportunities for collaboration were provided in:

Individual stakeholder interviews: early in the project process, consultant team members contacted a variety of stakeholders not seated on the Steering Committee, to inform them of the Plan's scope and schedule, as well as to obtain their input. The following individuals were contacted as part of this effort:

1. Eric Menzer, YorkCounts Board Chair, Wagman Construction
2. Susan Barry, York County Community Foundation
3. Karen Holt, BRAC Manager, Chesapeake Science and Security Corridor (CSSC)
4. Jean Treuthart, Harrisburg Area Community College (York)
5. Raymond Rosen, Wellspan Health
6. Fred Gates, Vice President & General Manager, York Vehicle Operations
7. Bill Yanavitch, Vice President, Human Resources & Administration, Glatfelter Co.
8. Jon Kinsley, Kinsley Construction
9. Carol Kauffman, Crispus Attucks
10. Christina Muahaur, Downtown, Inc.
11. Terri Kaufman, South Central Workforce Investment Board
12. Representative Eugene DePasquale, District 95
13. Paul Hedin, President, Lobar Associates
14. Katie Miles, YCEDC
15. Joe Wagman, Better York
16. Steve Overbay, BRAC Coordinator, Aberdeen Proving Grounds
17. George Waldner, President, York College
18. Joel Rodney, Chancellor, PSYU

19. William Kerlin, Graham Group
20. Jeanette Torres, Renee Caraballo, York Spanish American Center
21. Russ Montgomery, REDDI
22. Tom Donley, York Chamber of Commerce
23. Representative Scott Perry, District 92
24. Ed Messner, West Shore Chamber
25. Phil Robinson, Halisco Group
26. Robert Buzzendore, Hoffmeyer & Semmelman
27. Meg Fullerton, The Valley Tavern

2008 Municipal Work Sessions (Open to the Public): a series of three municipal work sessions open to the general public were conducted in each of York County’s five (5) planning regions (e.g. Northern Region, Greater York Region, South Western Region, South Central Region, and South Eastern Region). The first set of meetings was held to discuss vision and goals for economic development by region; the second set to review an updated vision statement and results of a technical market and land assessment by region; and the third set to discuss a technical business assessment, case studies and initial strategies for action by region.

2008 Public Meetings: in addition to the municipal work sessions, two (2) meetings were held to provide forums for general public comments. First, YCPC and YCEDC held a public meeting to inform the public of the technical business assessment, case studies and initial strategies by region. Next, the York County Board of Commissioners held a public hearing to present the completed York County Economic Development Plan.

2013 Public Survey: YCPC and YCEA released a public survey as an outreach effort to gather data from a variety of public and private stakeholders as well as individuals to re-prioritize the top concerns for each of the five (5) planning regions.

2014 Public Meetings: YCPC and YCEA held five (5) public meetings, one in each of the planning regions, to present the draft updated Plan and obtain public comment. A final draft of the Plan was presented to the County Commissioners who then held a public hearing on the Plan. This was another opportunity for public comment.

[1.5 Work Completed](#)

To complete the York County Economic Development Plan, the consultant team undertook a series of key tasks over a twelve month period which included:

1. Project Mobilization
2. Defining Sustainable Development and the Purpose of the Plan
3. Creating an Economic Development Vision for York County
4. Existing Conditions Analysis
5. Needs Assessment

6. Industry Cluster Analysis Update and Business/Industry Attraction, Expansion & Retention Assessment
7. Analysis of York County's Available Economic Development Resources, Economic Development Structure, and Relevant Case Studies
8. Outline: Strategies & Recommendations
9. Development of Draft/Final Economic Development Plan

To complete the 2014 Plan update, staff of the YCEA and YCPC reviewed the 2009 Plan in its entirety, which generally included the tasks listed above. Although much of the Plan remains the same there have been some significant changes based on more relevant and/or current information.

Chapter II

Vision Statement

2.1 Countywide Vision

A strong plan for sustainable economic development begins with a clear vision for economic growth. The Countywide vision for economic development, which was informed by the input of a variety of public and private stakeholders through a public survey, may be summarized through a listing of overarching goals for economic development, a description of where such economic growth is desired to occur, and an identification of what type of economic development is envisioned.

Overarching Goals for Economic Development:

- Manage growth and development
- Conserve rural and scenic areas
- Protect agriculture

Where Should Economic Development Occur?

- Downtown: thriving and revitalized City, Boroughs, and Townships should be realized through infill and adaptive reuse of underused buildings and sites
- Villages and Boroughs in rural areas
- Existing industrial parks: growth should be focused where infrastructure already exists
- Commercial corridors: growth should occur along major road corridors, but such development should be balanced with development that is accessible via alternative modes of transport (e.g. sidewalks, transit)
- Existing growth areas: growth should be focused in areas already designated for growth, where infrastructure exists to support growth

What Type of Economic Development is Envisioned?

- Diversified manufacturing and industrial uses, including research and development, technology and innovation
- Range of retail uses and scales, including neighborhood-oriented, smaller-scale retail shops to address the daily needs of residents
- Community/cultural facilities and professional services, from youth centers to medical offices, to serve residents
- Small business development and expansion
- Sustainable agriculture, agritourism, and businesses to support agriculture
- Recruitment and retention of target industries

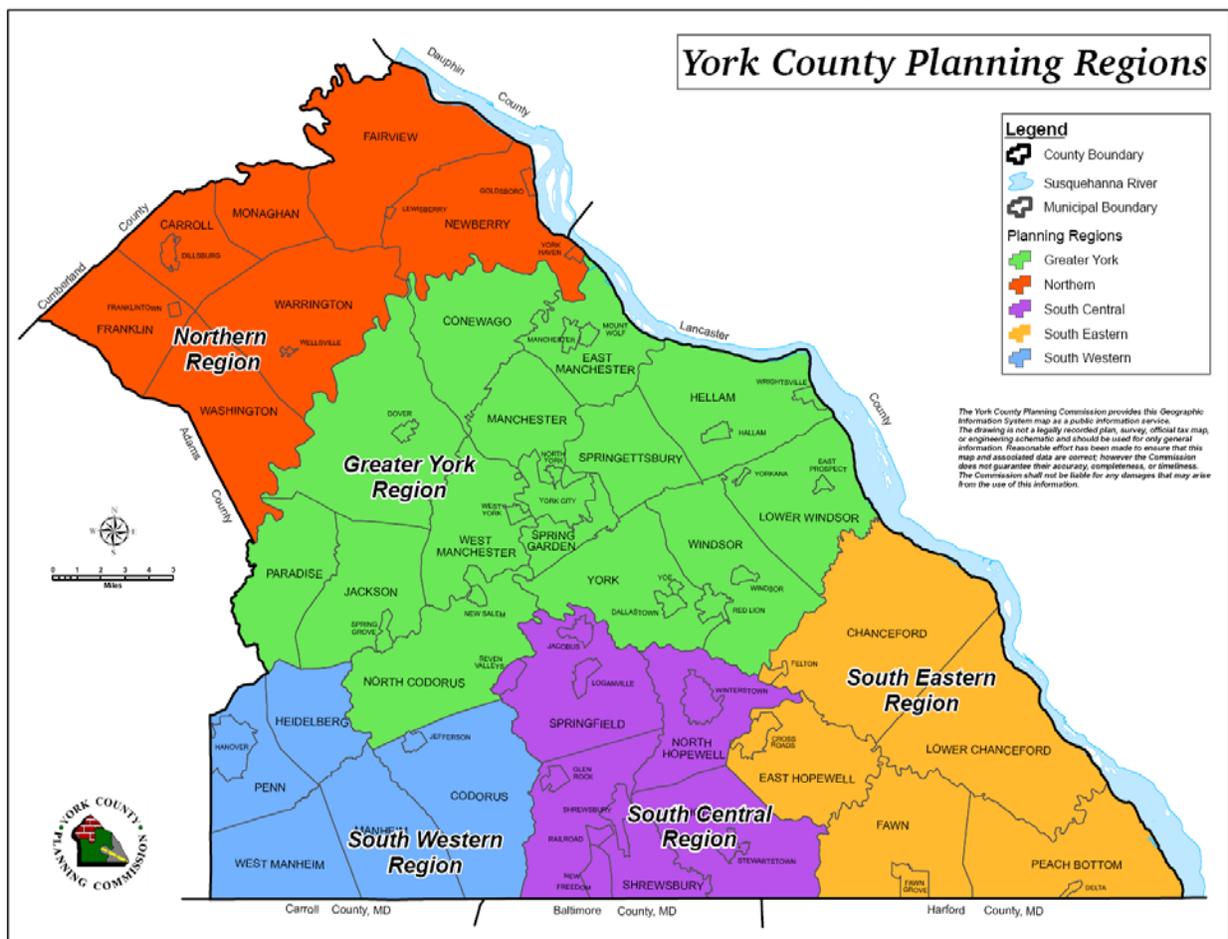
As part of the 2014 update, a public survey was developed by the York County Economic Alliance (YCEA) and the York County Planning Commission (YCPC). The survey was released on August 1, 2013, and was closed on December 15, 2013. The survey was distributed to the public via the YCEA and YCPC websites, YCEA newsletters, weekly e-blasts, social media, and associated boards and committees.

During the gathering of the data, the public was asked to share their assessment of critical issues, visions, and strategies relative to where they both work and live. The following discussion provides a summary of the responses received.

2.2 Visions for Planning Regions

York County is home to a diverse set of five (5) Planning Regions, which include the Northern Region, the Greater York Region, the South Western Region, the South Central Region, and the South Eastern Region.

Exhibit 2-1: York County's Planning Regions



Source: York County Planning Commission

Vision statements for each planning region were refined based on the survey responses. The visions below capture the originally identified goals, as well as the 2014 goals. These visions represent generalized statements for the entire region, and are not presumed to apply to each municipality within that region. For example, not every municipality will have agricultural land to protect, despite agricultural protection being a key part of the vision statement for the entire region. For each planning region, the overarching Countywide goals of managed growth and

development, conservation of rural and scenic areas, and protection of agriculture apply. In general, it is the location, scale, and types of office, retail and industrial uses desired which vary by region. These vision statements are listed in the following exhibits.

Exhibit 2-2: Northern Region Vision Statement (4.3% of responses received)	
2009	2014
Managed growth and development	Managed growth and development
Conservation of rural and scenic areas	Conservation of rural and scenic areas
Revitalization and infill in boroughs	Neighborhood-serving, smaller-scale retail expansion that addresses the daily needs of residents
Commercial corridor development along major arterials [e.g. Interstate 83, Interstate 76, Route 15, Route 74, Route 194 (Baltimore Pike), Route 177 (Rosstown Road), Route 382 (Lewisberry Road), Route 262 (Valley Road), Route 392 (Yocumtown Road), Route 295 (Cragmoor Road), and Route 181 (York Haven Road)]	Revitalization and infill development (redevelopment)
Limited higher density, mixed-use development in growth areas	Agricultural Protection
Agricultural protection	Agriculturally related support businesses
Agriculturally related support businesses	Development of community/cultural facilities and services (e.g. including a youth center, playground, performing arts center, library, and medical clinic)

Exhibit 2-3: Greater York Region Vision Statement (76.7% of responses received)	
2009	2014
Managed growth and development	Small business retention and expansion where infrastructure supports growth
Conservation of rural and scenic areas	Neighborhood-serving, smaller-scale retail expansion that addresses the daily needs of residents
Revitalization and infill for City, boroughs, and townships with underused buildings	Revitalization and infill development (redevelopment)
Commercial corridor development balanced with development accessible via alternative modes of transportation (e.g. sidewalks, transit)	Managed growth and development
Higher density mixed-use development in	Development of community/cultural facilities

growth areas (for example, creation of a Town Center in Springettsbury Township to include mixed use development, light industrial, and neighborhood oriented retail)	and services (e.g. including a youth center, playground, performing arts center, library, and medical clinic)
Recruitment of target industries, including firms engaged in research and development, technology and innovation	Conservation of rural and scenic areas
Agricultural protection	Commercial corridor development that is accessible via alternative modes of transportation (e.g. sidewalks, walking, bicycling, and/or bus)

Exhibit 2-4: South Western Region Vision Statement (10.0% of responses received)	
2009	2014
Managed growth and development	Small business retention and expansion where infrastructure supports growth
Conservation of rural and scenic areas	Managed growth and development
Revitalization and infill in boroughs, including restaurants, small retail shops, and small-scale offices to serve the local population	Revitalization and infill development (redevelopment)
Limited neighborhood-serving, smaller-scale retail expansion in townships that address the daily needs of residents	Diversification of manufacturing and industrial-based development
Diversification of manufacturing and industrial-based development	Agricultural Protection
Agricultural protection	Recruitment of target industries, including firms engaged in research and development, technology and innovation
Agritourism, which could include but is not limited to farm bed and breakfasts, wineries, corn mazes and hayrides	Office, retail and industrial growth directed to existing industrial parks
Agriculturally related support businesses	Conservation of rural and scenic areas

Exhibit 2-5: South Central Region Vision Statement (6.6% of responses received)	
2009	2014
Managed growth and development	Small business retention and expansion where infrastructure supports growth
Conservation of rural and scenic areas	Neighborhood-serving, smaller-scale retail expansion that addresses the daily needs of residents

Small business retention and expansion where infrastructure supports growth	Revitalization and infill development (redevelopment)
Retail to serve population	Conservation of rural and scenic areas
Office, retail and industrial growth directed to existing industrial parks	Agricultural Protection
Agricultural protection	Managed growth and development
Agriculturally related support businesses	Higher density mixed-use development (e.g. creation of a Town Center to include mixed use development, light industrial, and neighborhood oriented retail)

Exhibit 2-6: South Eastern Region Vision Statement (2.4% of responses received)	
2009	2014
Managed growth and development	Conservation of rural and scenic areas
Conservation of rural and scenic areas	Agritourism, which could include, but is not limited to, bed and breakfasts, corn mazes, hayrides and farmers markets
Limited neighborhood-serving retail expansion focused along the Route 74 corridor and boroughs, with an emphasis on smaller-scale shops	Agricultural Protection
Development of community/cultural facilities and services, including a youth center, playground, library, and medical offices	Development of community/cultural facilities and services (e.g. including a youth center, playground, performing arts center, library, and medical clinic)
Agricultural protection, including development of sustainable and organic agriculture	Neighborhood-serving, smaller-scale retail expansion that addresses the daily needs of residents
Agritourism, which could include but is not limited to bed and breakfasts, corn mazes, hayrides and wineries	Office, retail and industrial growth directed to existing industrial parks
Agriculturally related support businesses	Small business retention and expansion where infrastructure supports growth

A review of the survey results showed that the response rate may be indicative of the outreach ability and the general concern of the residents of each of the regions, or it may indicate a representation of the county's demographic profile.

Greater York responses = 76.7%, Population as a portion of the County = 61%
 South Western responses = 10.0%, Population as a portion of the County = 12%

South Central responses = 6.6%, Population as a portion of the County = 8%

Northern responses = 4.3%, Population as a portion of the County = 14%

South Eastern responses = 2.4%, Population as a portion of the County = 5%

As compared to the 2009 vision statements, some of the regions have shifted their priorities, but they generally remain consistent. What is most evident, overall, is a shift from physical infrastructure and development priorities to a vision where small business retention and expansion is more of a priority. This appears to represent a reaction to the recent economic recession and the desire to see small, local businesses survive.

Overall, throughout the entire County, the following were the top priorities:

- Small business retention and expansion where infrastructure supports growth (51.7%)
- Neighborhood-serving, smaller retail expansion that addresses the daily needs of residents (45.0%)
- Managed growth and development (40.8%)
- Revitalization and infill development/redevelopment (40.3%)
- Conservation of rural and scenic areas (33.2%)
- Development of cultural facilities and services (29.4%)

The survey also provided an opportunity to gather additional information and ask key questions that could potentially identify new projects, additional key focuses, and to learn if the public is aware of certain programs. The questions and responses are summarized below.

Workforce

The public was asked: Are you aware of the business and education partnerships that exist in York County? These groups serve as advisory committees within school districts to advance workforce development in the community. The York County Alliance for Learning (YCAL) is connected with the Economic Alliance's Office of Workforce Development (OWD). Together, the organizations build a strong connection between the business and education communities to improve the implementation of programs, ultimately improving the quality and quantity of opportunities for youth. The partnership enhances the OWD's mission to engage employers, educators and community partners to create a life-long learning environment that attracts and retains strong businesses and a diverse talented workforce critical for sustaining a vibrant community and a growing, innovative economy. Of the responses, 47% stated that they were aware of these partnerships and services; 27% answered no, they were unaware; and 26% did not respond.

York County is on the forefront of showing everyone the power of being creative. It's the place where innovative industrial artists and designers gravitate to find jobs that allow them to unleash their creativity. York County has some of the finest industrial designers and artists in the mid-Atlantic region. These manufacturers and their skilled employees design and craft some of the finest motorcycles, violins, packaging containers and aeronautic parts in America. They design and build leading robotic systems that help companies move into tomorrow and produce interior wall coverings that find their way all over the world.

The public was asked: Are you aware of the branding efforts of Creativity Unleashed for showcasing York as America's Industrial & Design Capital in an effort to promote the quality of life in York and to attract a creative workforce? 44% of the respondents answered yes, they were aware of the Creativity Unleashed efforts; 29% answered no, they were unaware; and 27% did not respond. During the course of the active public surveying, the Creativity Unleashed website showed a 30% jump in website hits.

Agriculture & Land Protection

One of the questions for this category was: Are you aware of the York County Agriculture Business Council (YCABC) and York Buy Fresh Buy Local (BFBL) and their development of a strong local food system? (e.g. farm-to-table initiatives, farm-to-school initiatives, farm-to-institution initiatives). Both initiatives are active in the community and are volunteer run with the mission to connect the people of York County to locally produced food and farm products, and to promote the importance of agriculture to York County's economy. Overall, 55% of the respondents replied yes, they are aware of these efforts; 18% replied no, they were not aware; and 27% did not respond.

The York County Agricultural Land Preservation Board (YCALPB) and the Farm and Natural Lands Trust of York County (FNLT) have been dedicated to preserving our farm and natural lands for future generations. Another question was: Are you aware that together the Farm and Natural Lands Trust of York County and the York County Agricultural Land Preservation Board have successfully preserved over 46,300 acres of farmland on over 346 properties in York County that can no longer be developed? Responses included 47% who answered yes, that they were aware of these milestone efforts; 25% of the respondents answered no, they were unaware; and 28% did not respond.

The final question was: Are you aware of a farm that you feel should be preserved as farmland? Among the many responses, there were farms identified in Dillsburg Borough, Springettsbury

Township, and York Township, as well as the Marietta Water Company property in Hellam Township.

The survey results indicate that the public is somewhat familiar with the Economic Development programs and initiatives that exist in York County, but also indicate that there is an opportunity to educate the public about some of the work that is currently being undertaken by various groups. With only approximately 48% of the public aware of the Office of Workforce Development, Creativity Unleashed, Buy Fresh Buy Local, the Farm and Natural Land Trust, and the York County Agricultural Land Preservation Board, there is a need for additional marketing and outreach by each of these programs, or in conjunction with other partner agencies.

Development and Redevelopment

Redevelopment is a key component of York County's economic development strategy. In order to address problems of urban decay and blight, reuse and infill development strategies must be implemented to help revitalize and target development in York County's historic downtowns. Redevelopment projects can return our existing infrastructure to productive use and increase the tax base. In this category, the public was asked: Are you aware of a dilapidated or abandoned property in your area that needs attention? Have you often thought that a certain type of business or development should be in a specific location? Both of these questions were purposefully open-ended and were intended to encourage creative thoughts and ideas, as well as to identify new goals within the five (5) planning regions. Over 120 responses and suggestions to these two (2) questions alone were received. Below are a few of the publicly identified suggestions.

South Western Region

- 219 Baltimore Street in Hanover Borough was identified on numerous occasions and was a suggested location for Rabbit Transit.
- A performing arts theatre, and pub style restaurant in downtown Hanover.
- Downtown Hanover, in general, was identified as a location of dilapidated and abandoned buildings.

South Central Region

- A variety of small shops in Glen Rock.
- A mixed-use retail or restaurant development outside of the downtown of Shrewsbury that would benefit the residents of the Township.
- 34-40 Main Street in Glen Rock was identified as a building that needs attention.

South Eastern Region

- No detailed responses to the questions.

Greater York Region

- Both the Weinbrom building and the Woolworth buildings were identified in downtown York, as well as the AAA building on East Market Street.
- A quality restaurant in Red Lion Borough was suggested, as well as better promotions for the areas bed & breakfast establishments.
- It was suggested that the river front towns should have a series of small bistros and retail shops.
- An entertainment complex with dancing, sports activities could be housed in the old prison building in downtown York.
- Many additional properties were identified along with addresses which could lead to numerous new projects.
- Many dilapidated or abandoned properties were identified, such as the Old Jail on Chestnut Street, West Market Street in York City, ten (10) to 12 specific properties in Yoe Borough, and the 900 block of Stoverstown Road in Manchester Township.

Northern Region

- Several residential rental properties with potential problems were identified in Dillsburg Borough.
- A Giant or Karns grocery store by the Wal-Mart in Newberry Commons Plaza.
- Fairview Township was identified as a place for a potential winery and a community garden area.
- The trailer park on Old York Road in Fairview Township (across from Giant) was identified as a property that needs attention.

The public input and ideas section of the survey has provided some very interesting and exciting thoughts from the respondents. Further analysis and exploration of the 120+ ideas will certainly lead to more ideas and identified areas where projects could occur throughout the County.

Summary

Public input is critical to Economic Development planning activities. Although much of the work and priorities developed are based upon data, research and trends in the social and business communities on a local, regional and national level, a vision of the immediate area must be developed. Stakeholder input through surveys and meetings can help to inform the Economic

Development and Planning professionals about a local region's priority visions for growth, or vision for lack of growth, as the case may be.

Generally, the survey results indicated the following major points:

- Each of the regions' visions and top priorities shifted slightly over the past five (5) years, and there seems to be more of a priority placed on business attraction and existing business retention. This is indicative of the response to a challenged economy and the fact that residents desire to see the local mom and pop stores survive and remain in business.
- The public knowledge level about existing Economic Development programs appears to indicate a need for additional promotion of initiatives. With approximately 48% of respondents aware of programs, such as Creativity Unleashed and Buy Fresh, Buy Local, there is an outreach component that is needed.
- The public ideas and input received during the survey will be invaluable moving forward to be able to craft new projects and focus on areas where the public's vision of an area can be realized. The YCEA should develop a portion of their website, or at least an email address, where citizens can continue to provide information about dilapidated properties, properties that simply "need attention" and also provide their own ideas and views about what initiatives or projects could be undertaken as priority.

Chapter III

Economic Snapshot

3.1 Overview

This updated section highlights key economic and demographic conditions and trends in York County that impact business development and attraction in the County. The snapshot includes summary statistics, with the most current data available, for surrounding communities to offer insight into how York County compares to its immediate neighbors, and to document the regional context that impacts the County.

A strong, future-oriented Plan begins with an assessment of current conditions. This evaluation of existing conditions focuses on factors known to influence industry growth potential, and is an important first step in order to project future market demand for economic activities.

3.2 Population

York County has experienced strong growth of population in recent years, and this trend is only expected to accelerate over the next ten (10) years.

- YCPC projections indicate York County could add approximately 36,000 new residents from 2008 to 2020, if past trends in household growth were to continue (Exhibit 3-2).
- Of course, the realization of these new residents in large part depends on the provision of housing for the population, so the exact number of new residents will depend on the availability of housing.
- This population growth can help York County to attract employers, as new residents expand the labor force and offer disposable income to fuel retail and service sector growth.

York County has been regionally consistent in residential growth compared to many of its neighboring counties, as well as Pennsylvania and Maryland as a whole (Exhibit 3-1).

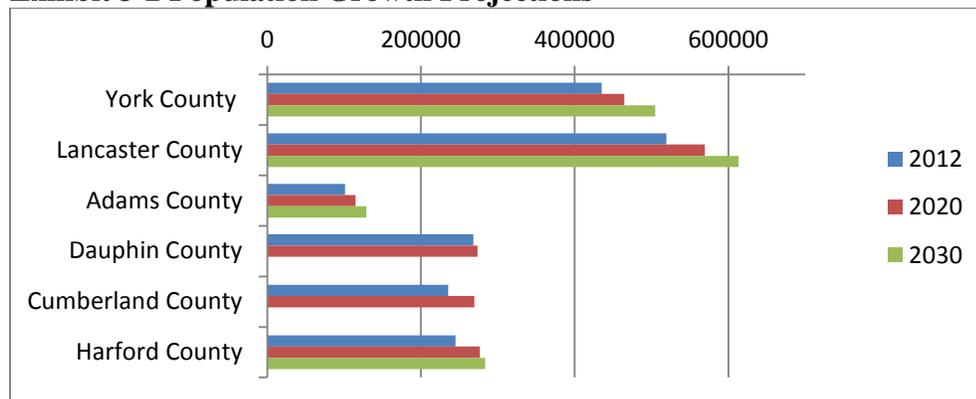
- York County added residents at a pace of 2.3% between 2008 and 2012, compared to 1.0% in Pennsylvania and 11.1% in Maryland.
- The neighboring counties of Lancaster, Dauphin, Cumberland, and Baltimore all experienced rates of growth similar to York County.
- The semi-consistent growth of residents in each County can also explain the similar amount of permits issued for new construction.

- In 2012, the amount of residential building permits issued for York County was very similar to Cumberland, Harford, and Baltimore Counties. There was a difference of less than 40 permits.
- From 2006 to 2012, all regional counties saw a decrease in residential permits issued as a result of the nationwide “housing crisis.” In fact, York County went from a high of 2,552 permits in 2006 to a low of 593 permits issued in 2011. All regional counties are starting to show recovery and all experienced an increase in 2012 (Exhibit 3-3a).
- From 2002 to 2007, more residential building permits were issued in York County than in surrounding counties. The same holds true for permits issued from 2006 to 2012, with York County issuing 9,130 residential building permits compared to 8,254 for Lancaster County (Exhibit 3-3).

Exhibit 3-1: Population in Comparison					
Counties	2008	2012	2008-2012 % Change	2020	2030
York County, PA	428,020	437,846	2.3%	464,424	504,958
Lancaster County, PA	505,665	526,823	4.2%	569,343	613,208
Adams County, PA	103,506	101,482	- 2.0%	114,876	128,893
Dauphin County, PA	258,537	269,665	4.3%	273,483	N/A
Cumberland County, PA	231,650	238,614	3.0%	269,373	N/A
Baltimore County, MD	797,284	817,455	2.5%	N/A	N/A
Harford County, MD	249,753	248,622	- 0.5%	276,500	283,600
States					
Pennsylvania	12,631,267	12,763,536	1.0%	12,787,354	12,768,184
Maryland	5,296,486	5,884,563	11.1%	6,497,626	7,022,251

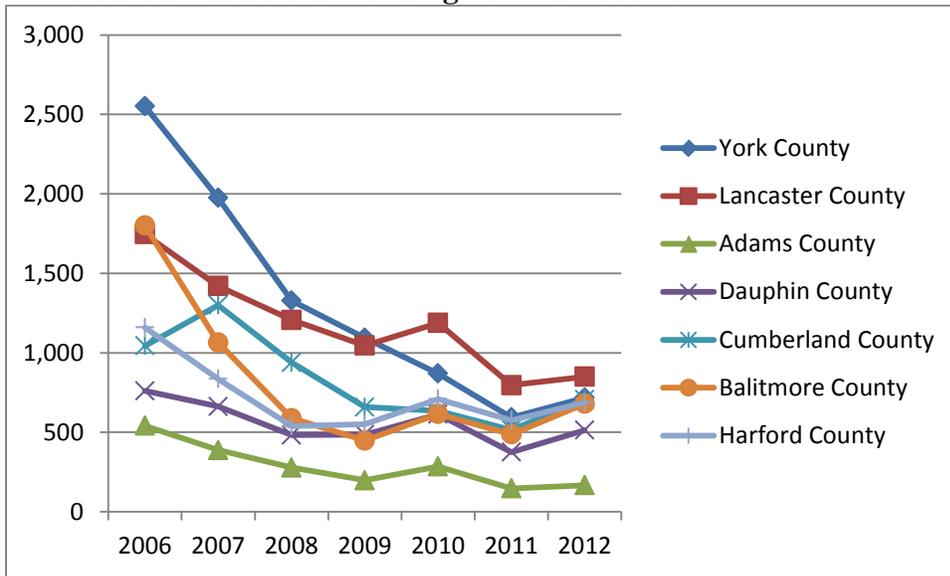
Source: County Planning Commission Websites and Census Data

Exhibit 3-2 Population Growth Projections



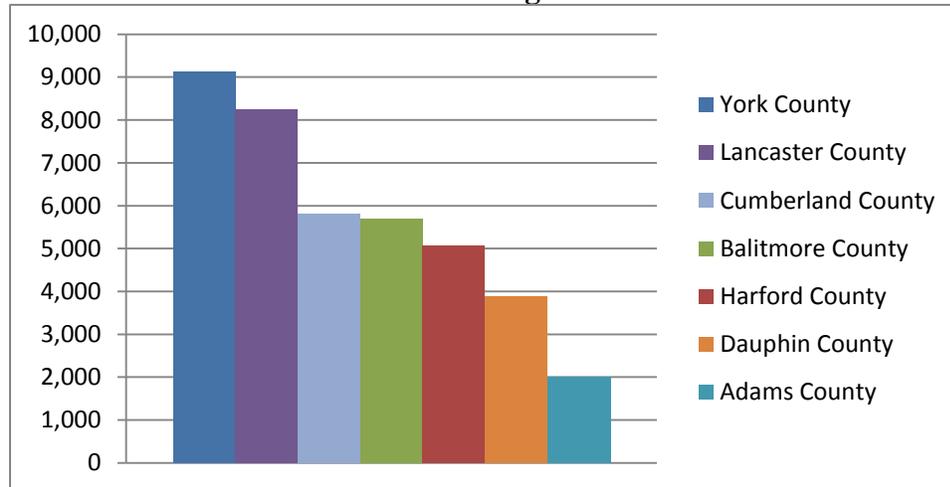
Source: Planning Commission Websites, U.S. Census Data

Exhibit 3-3a Residential Building Permits 2006-2012



Source: U.S. Census Bureau Data

Exhibit 3-3b Total Residential Building Permits 2006-2012



Source: U.S. Census Bureau Data

As Exhibits 3-3a and 3-3b show, York County was a strong leader in the number of residential building permits issued in 2006 and 2007 and remained the leader in regional residential growth overall from 2006 through 2012.

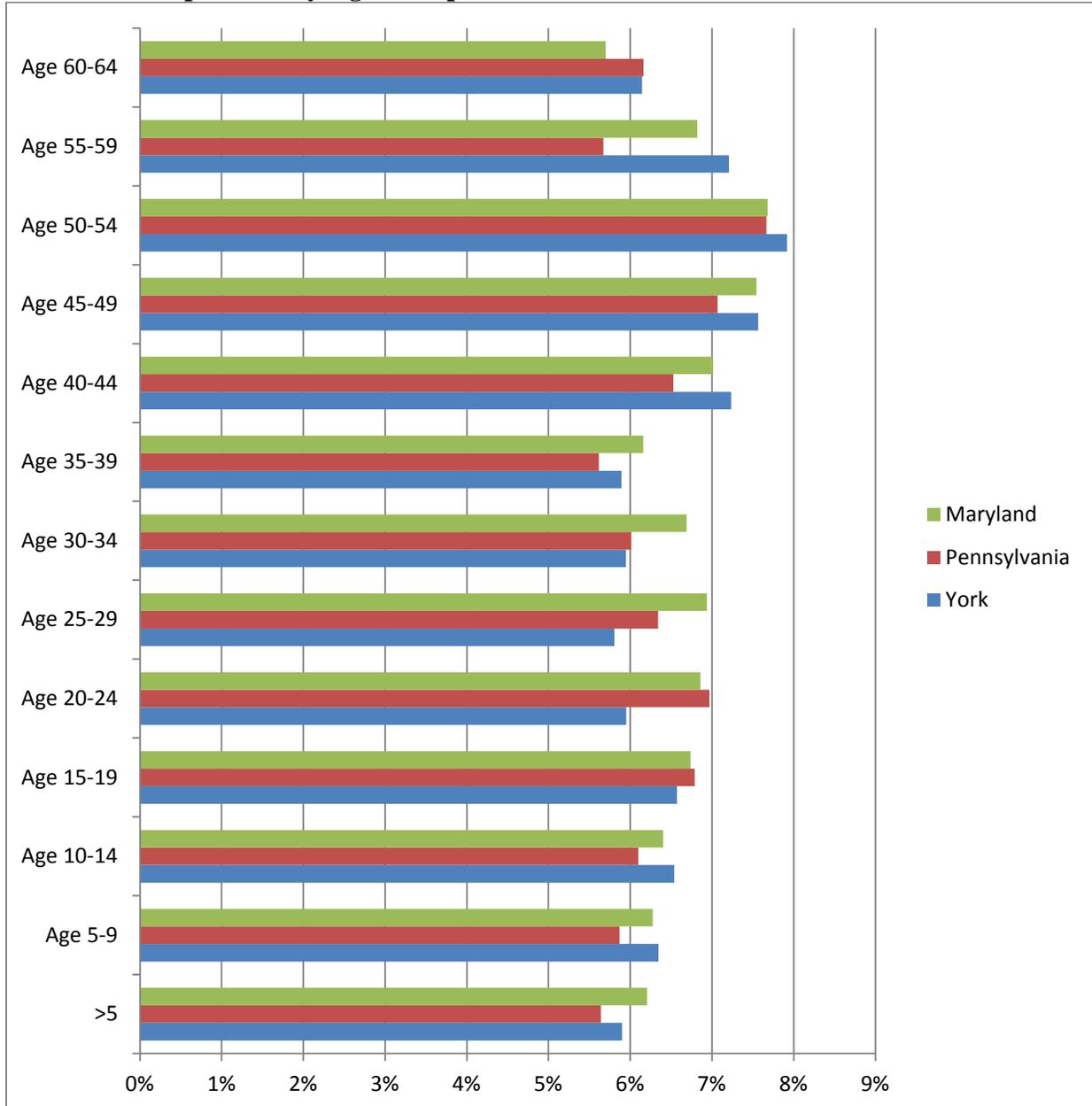
3.3 Age Levels

York County's age levels are similar to those in Pennsylvania and Maryland, all of which have many residents in the 35 to 55+ age groups (Exhibit 3-4).

- As demonstrated in Exhibit 3-4 York County's percentage of population in age groups 15-34 was slightly below Maryland and Pennsylvania in 2012, but above one or both states in the percentage of working ages 35-59.

- Over the next five (5) years, the proportion of residents in the 25-39 and 55 and over age brackets are expected to increase in both Pennsylvania and Maryland, while residents in the 40-54 bracket are expected to decrease (Exhibit 3-5).
- Generally speaking, Pennsylvania projections show a projected decrease in working age groups (18-64) through 2030 as workers reach retirement age, however through each projected cycle (2020, 2025 and 2030) the population of future workers (14-17) is anticipated to increase (Exhibit 3-5).

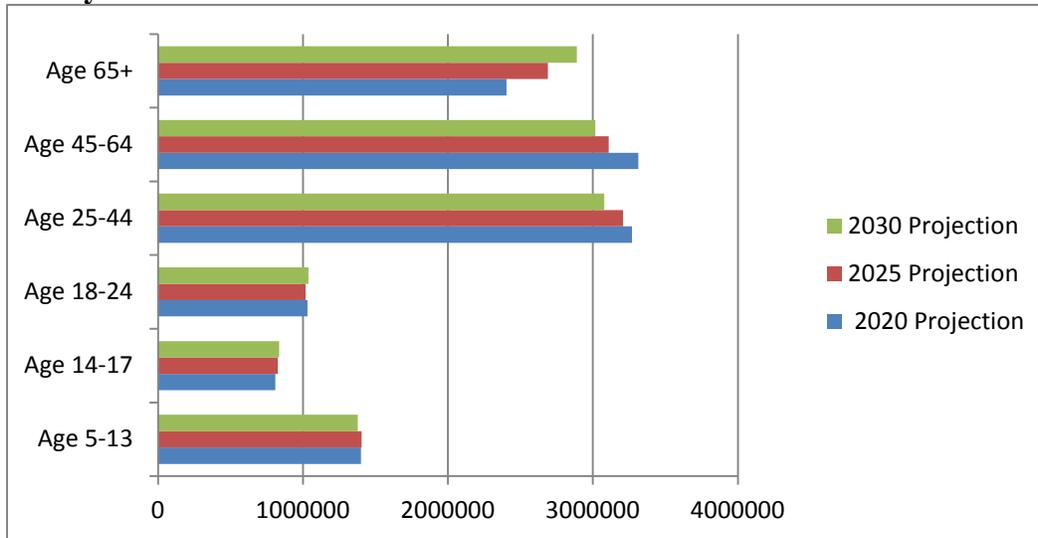
Exhibit 3-4: Population by Age Group – 2012



Source: U.S. Census Bureau Data

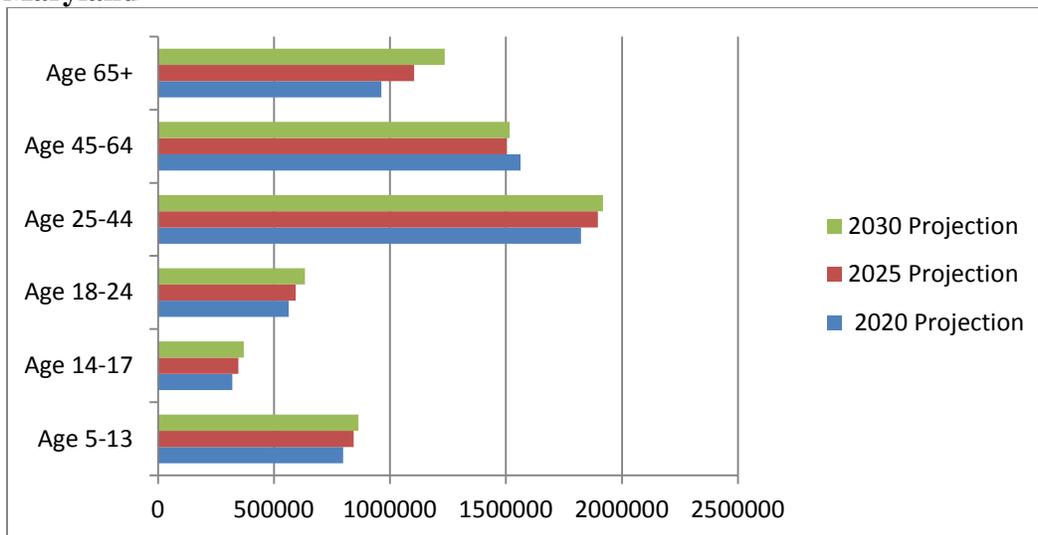
Exhibit 3-5: Population Projection by Age Group – 2020, 2025 & 2030

Pennsylvania



Source: U.S. Census Bureau Data

Maryland



Source: U.S. Census Bureau Data

3.4 Income and Wages

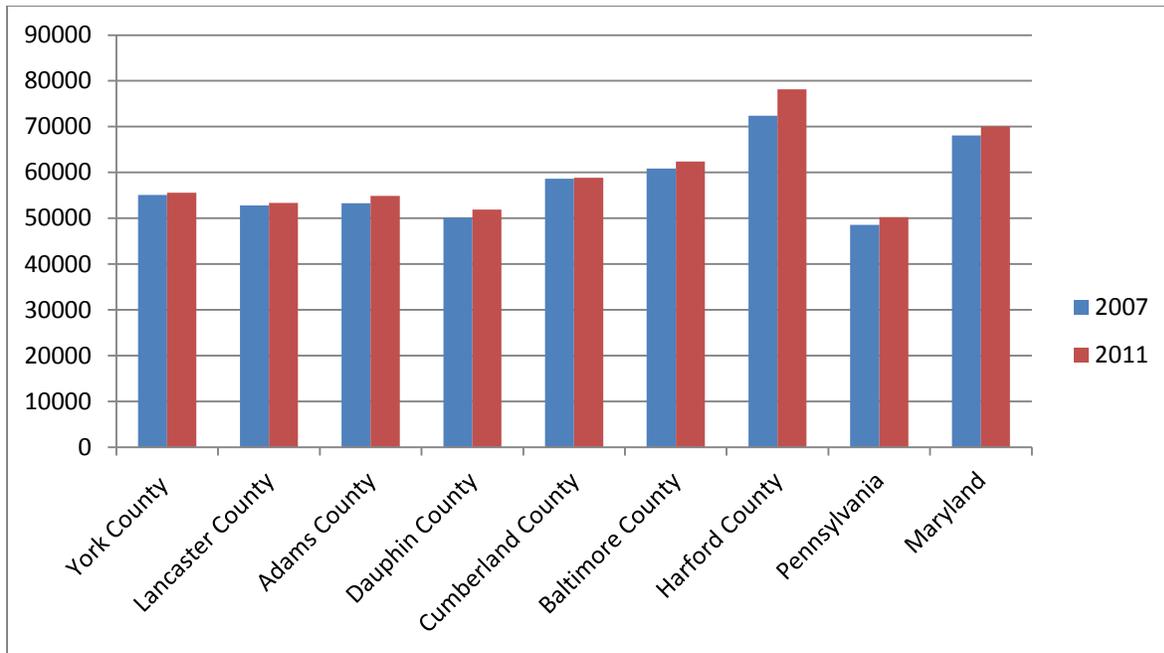
As shown in Exhibit 3-6, median income has increased in York County at a similar pace to surrounding counties over the past several years. Other notable observations are listed below.

- York County’s median income grew from \$55,120 in 2007 to \$55,551 in 2011, representing a compound annual growth rate of 1%, while median income in

Pennsylvania grew at a rate of 0.3% per year, from \$48,576 in 2007 to \$50,228 in 2011. York County’s 2011 median income (\$55,511) is in the middle of the pack compared to surrounding counties, and is higher than the Pennsylvania 2011 median income (\$50,228).

- For 2011, York County’s median income is lower than that of Maryland (\$70,004), Baltimore County (\$62,407), Cumberland County (\$58,824) and Harford County (\$78,123).

Exhibit 3-6: Median Household Income, 2007 and 2011



Source: U.S. Census Bureau Data

As shown in Exhibits 3-7 and 3-7a, wage levels have increased in York County at a similar pace to surrounding counties over the past several years. Other notable observations are listed below.

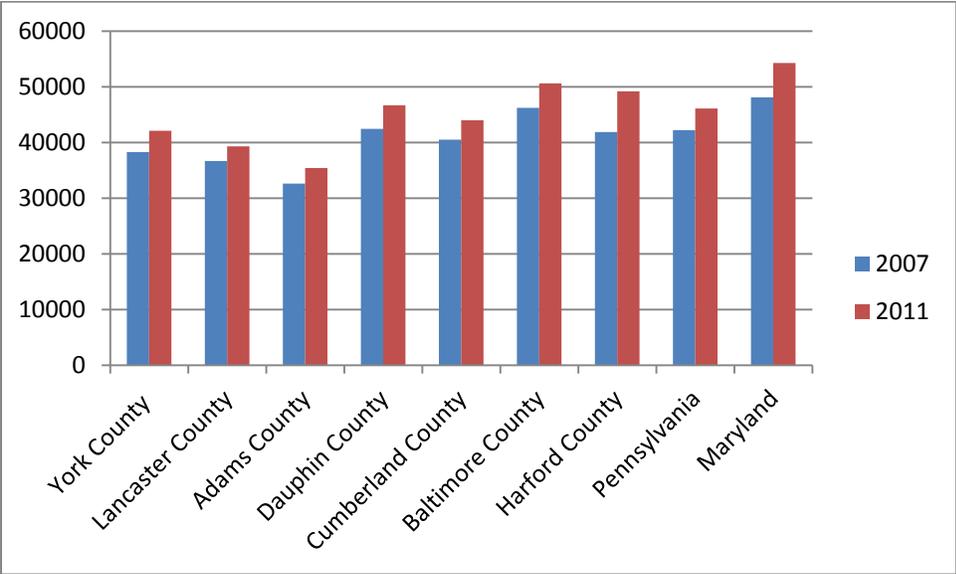
- A stronger pattern is observed when looking at growth of wage levels over the past three years. Wages paid by York County employers grew 3% per year from 2002-2012, the same annual growth rate as the State level (Exhibit 3-8).
- This wage growth was similar to the growth experienced in neighboring counties and in Maryland, where wages increased by 3 to 4% per year (Exhibit 3-8).

This income and wage data indicates that the County may offer an advantage with respect to labor costs compared to higher-cost communities to the south.

Exhibit 3-7: Average Wage Paid by Employers 2007-2011		
	2007	2011
York County	\$38,293	\$42,084
Lancaster County	\$36,672	\$39,313
Adams County	\$32,599	\$35,401
Dauphin County	\$42,449	\$46,655
Cumberland County	\$40,491	\$43,962
Baltimore County	\$46,207	\$50,631
Harford County	\$41,841	\$49,200
Pennsylvania	\$42,214	\$46,100
Maryland	\$48,113	\$54,281

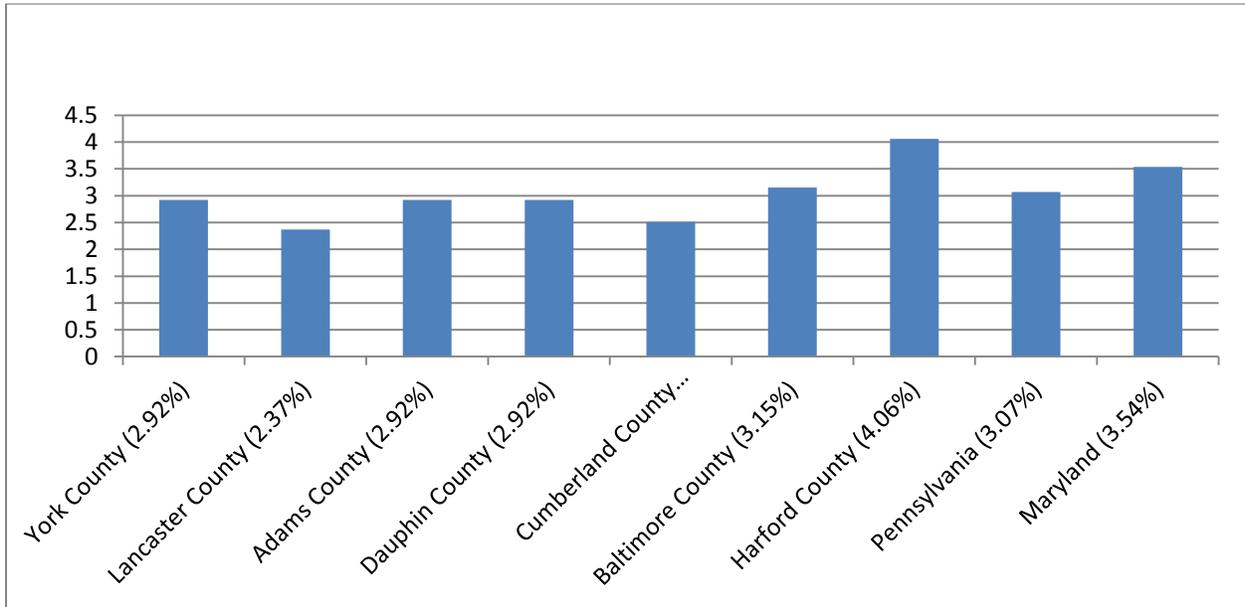
Source: Bureau of Economic Analysis, Average Wage per Job, 2007 and 2011

Exhibit 3-7a: Average Wage Paid by Employers, 2007 - 2011



Source: Bureau of Economic Analysis

Exhibit 3-8: Average Annual Wage Growth, Between 2002 and 2012



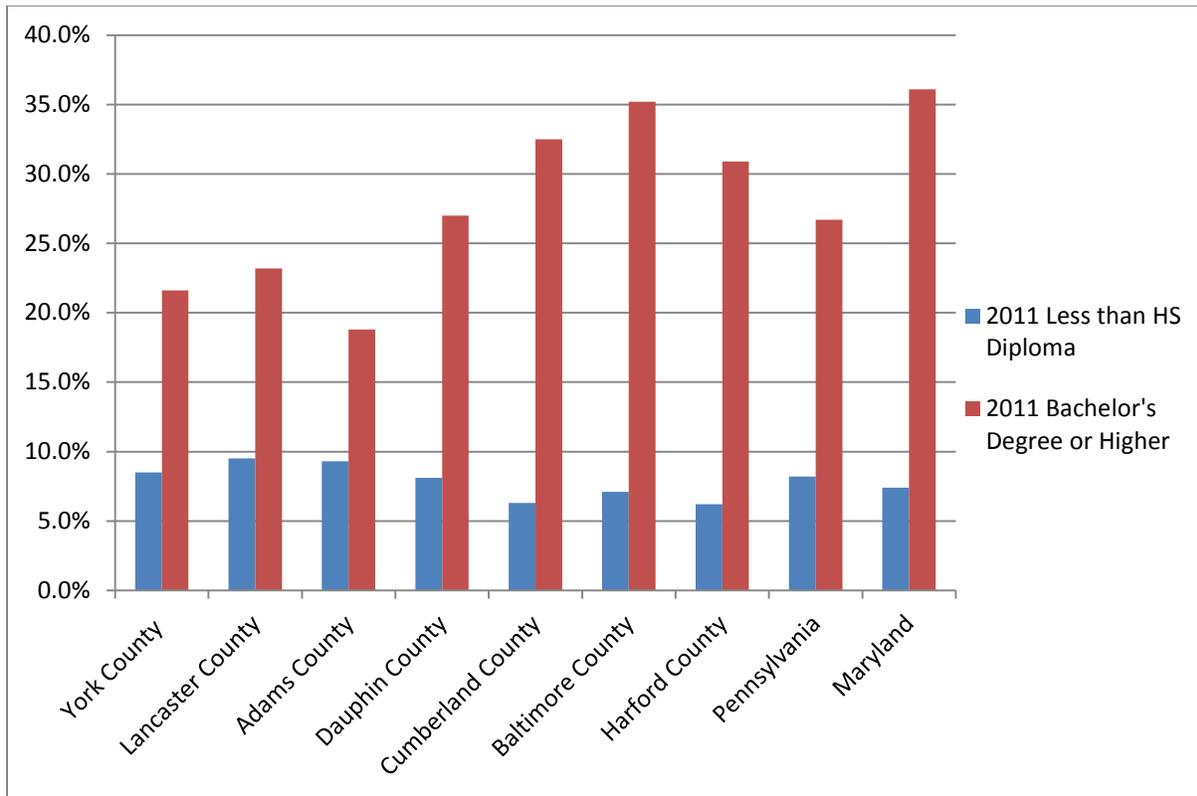
Source: Bureau of Economic Analysis

3.5 Education

As referenced in Exhibit 3-9 and Exhibit 3-10, there is a gap between York County's educational attainment levels (e.g. percentage of residents with a bachelor's degree) and those of some neighboring communities. York County also falls below the averages for Pennsylvania and Maryland.

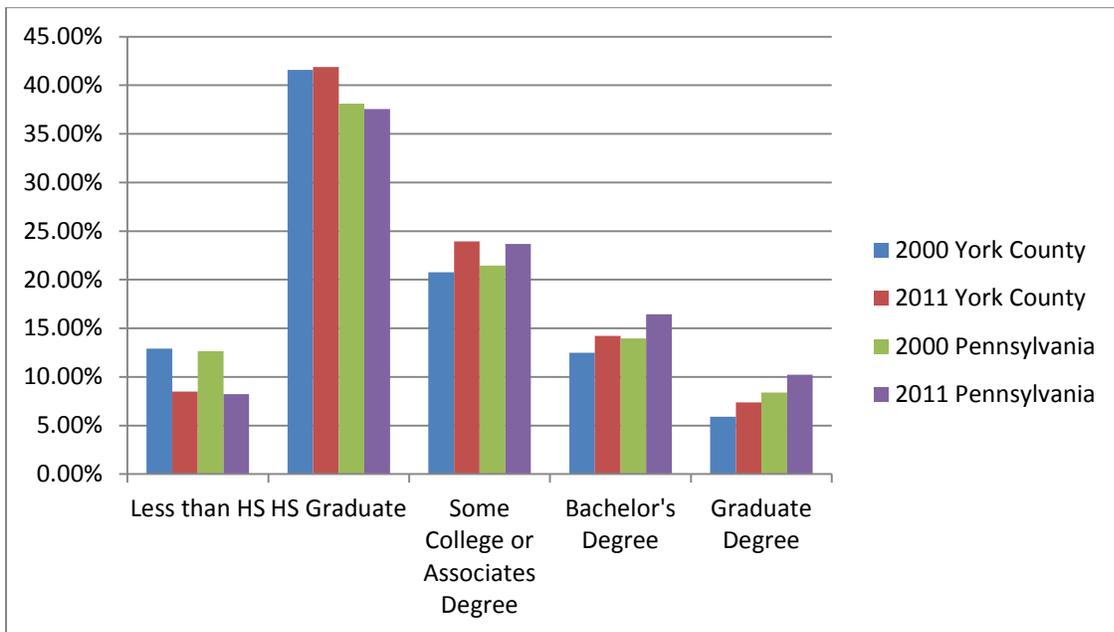
- However, York County has been improving on the educational front over the past 11 years, as the percentage of residents with a bachelor's degree and percentage of residents with a graduate degree have each increased.
- Another positive trend is that a higher proportion of York County high school students are now graduating, and more students are going on to earn associate's degrees after high school. The amount of students with less than a high school diploma has decreased at both the County and the State levels.

Exhibit 3-9: Educational Attainment, 2011



Source: U.S. Census Bureau Data

Exhibit 3-10: Educational Attainment, 2000-2011



Source: Policy Map

Performance of York County students in science and math education is an important consideration when evaluating the readiness of the workforce for employment in emerging industries over the next ten (10) years. As shown in Exhibit 3-11, York County students score above the State average.

The Pennsylvania System of School Assessment, also known as PSSA, measures how well students have achieved in reading, mathematics, science and writing according to Pennsylvania's world-class academic standards. By using these standards, educators, parents and administrators can evaluate their students' strengths and weaknesses to increase students' achievement scores.

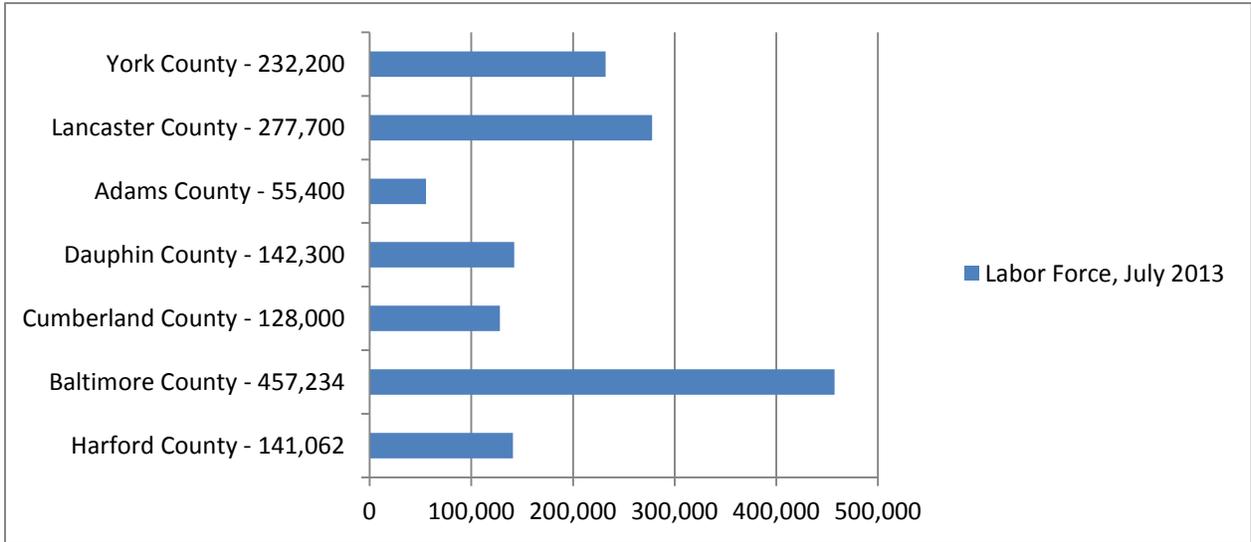
Exhibit 3-11: York County PSSA Scores 2011-2012 School Year					
School District	Science – Percent Proficient		Math – Percent Proficient		
	4th Graders	11th Graders	All Students	4th Graders	11th Graders
Central York	84	43	86	90	65
Dallastown Area	89	58	83	90	70
Dover Area	85	36	74	84	52
Eastern York	89	41	82	88	70
Hanover Public	76	30	69	79	55
Northeastern	86	42	83	88	63
Northern York	94	45	81	92	60
Red Lion Area	88	41	83	90	75
South Eastern	96	48	84	95	67
South Western	90	44	83	86	63
Southern York	91	51	85	89	69
Spring Grove	94	45	81	91	69
West Shore	86	45	74	82	61
West York Area	89	38	79	86	61
York City	67	9	52	66	32
York Suburban	97	58	90	98	73
County Average	88	42	79	87	63
State Average	82	42	74	82	59

Source: Pennsylvania Department of Education

[3.6 Labor Force and Employment](#)

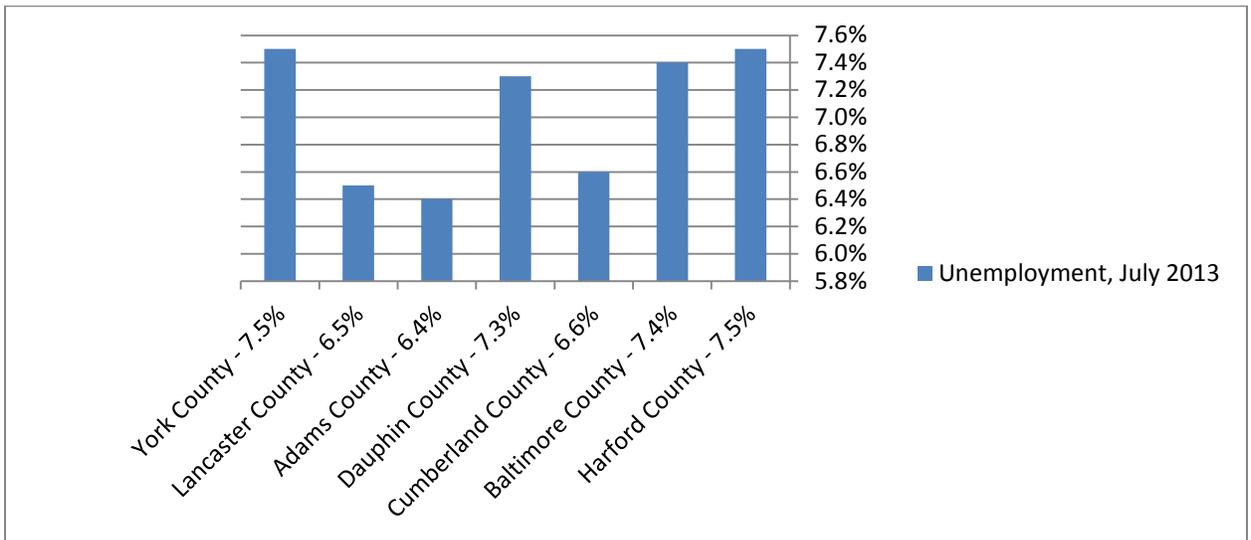
Community stakeholders have commended York County's labor force for its strong work ethic. As shown in Exhibit 3-12, the labor force comprises 232,200 civilian workers, making it comparable in size to neighboring Lancaster County (277,700 civilian workers) and larger than neighboring Adams (55,400), Dauphin (142,300), Cumberland (128,000) and Harford (141,062) Counties. In Exhibit 3-13, the County's unemployment rate, at 7.5% as of July 2013, was similar to the unemployment rate of surrounding counties and of Pennsylvania (7.5%) and lower than that of the nation (8.1%).

Exhibit 3-12: Labor Force, July 2013



Source: Pennsylvania Department of Labor & Industry and the Maryland Department of Labor, licensing and Regulation

Exhibit 3-13: Unemployment Rates, July 2013



Source: Pennsylvania Department of Labor & Industry and the Maryland Department of Labor, licensing and Regulation

Since 2006, York County has shown growth in a number of employment industry sectors. The health care industry sector has increased by 10%, building and construction sector by 5%, business and financial services sector by 8%, and the education industry sector has increased by 7%.

As shown in Exhibit 3-14, in 2009 the County’s largest industry sectors, in terms of employment, were advanced materials/diversified manufacturing (16% of all jobs), building and construction (14%), health care (18%), and education (15%).

Exhibit 3-14: York County Percentage of Employment by Industry, 2009	
Ag & Food Production	7%
Advanced Materials	16%
Bio-Medical	1%
Health Care	18%
Building & Construction	14%
Business & Financial Services	13%
Education	15%
Energy	3%
Information & Communication	4%
Logistics & Transportation	5%
Lumber, Wood & Paper	4%

Source: York County Economic Alliance Industry Cluster Analysis – 2009

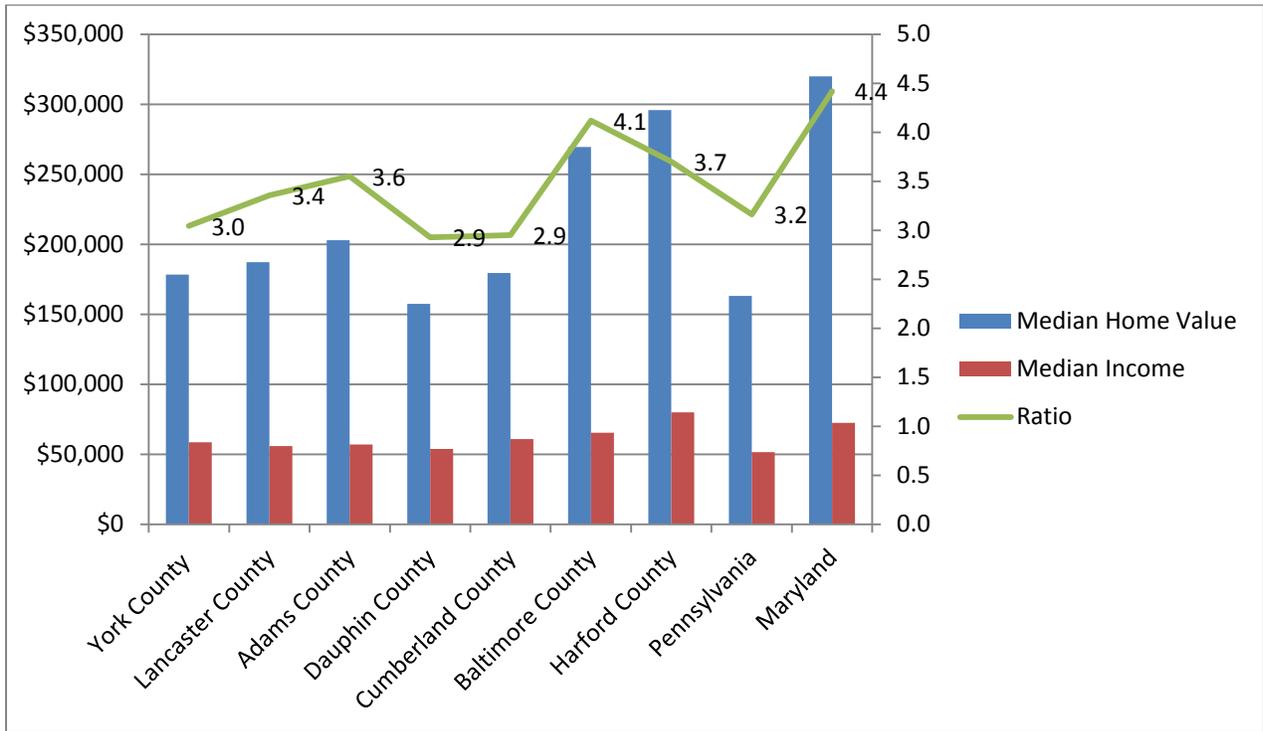
[3.7 Housing and Housing Affordability](#)

Housing, both in terms of diversity of choice and affordability, is one aspect of quality of life that can help to attract and retain a skilled labor force as shown in Exhibit 3-15.

- A broad array of housing choices are offered in the County, from historic downtown lofts in the City of York, to secluded wooded properties and single-family homes in suburban areas surrounding the City, to rural farms and small historic towns in the southern and northern parts of the County.
- Beyond housing, the County offers a broad mix of educational, cultural, artistic and recreational facilities and amenities that are key ingredients to high quality of life.
- The median home value in 2008 was \$190,000 and in 2011 was \$178,400. This is a result of the national “housing crisis” and represents a 6.2% drop in value.
- York County’s median home value in 2011, at \$178,400, is roughly 3.0 times higher than median income in the County. In 2011, York County’s housing stock was much more affordable than housing in areas to the south. The median home value in Maryland was nearly 4.4 times the annual income; in Baltimore County, the median home value was 4.1 times higher than income; and in Harford County, the ratio was 3.7. This ratio is similar

to the national average ratio, in which the average home price from 1950 to 2000 was three (3) times higher than annual income.

Exhibit 3-15: Median Home Values and Ratio of Home Value to Income, 2011

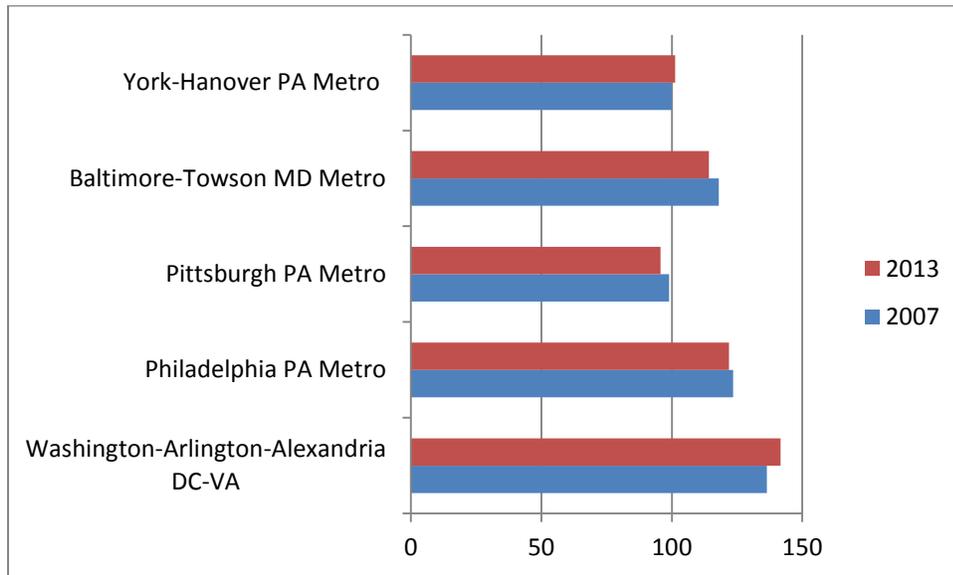


Source: U.S. Census Bureau

3.8 Cost of Living

Overall, the cost of living in York County in 2013 was more affordable than in surrounding regions. As depicted in Exhibit 3-16, the York-Hanover metropolitan area scored a 101.2 (100 is the national average) on the ACCRA (American Chamber of Commerce Research Association) cost of living index, lower than the Baltimore region (114.2), the Philadelphia region (121.9), and the Washington, DC region (141.7). Since 2007, the cost of living index scores for York County increased by 1.3%.

Exhibit 3-16: ACCRA (American Chamber of Commerce Research Association) Cost of Living Index, Fourth Quarter 2007 vs First Quarter 2013



Source: ACCRA Cost of Living Index – First Quarter 2013

3.9 Summary

Based on a review of York County’s current economic conditions, a number of strengths, constraints, and opportunities are evident. The issues raised by the constraints are further explored in Chapter VI through the Critical Issues Assessment, which also considers issues related to industries, the real estate market and available/suitable land for development (explored in Chapters IV and V, respectively). This evaluation of existing conditions focuses on factors known to influence industry growth potential, and is an important first step in order to project future market demand for economic activities.

Chapter IV

Industry Assessment

4.1 Overview

An important component of the York County vision for economic development is focused efforts to attract, retain, and expand firms in target industry clusters. As such, YCEA has prepared an industry cluster assessment pinpointing three (3) categories of targets: current strengths (strong performers nationally and current County specializations), high priority retention targets (lagging performers nationally but current County specializations), and emerging strengths (strong performers nationally but not currently County specializations).

Profiling these industries in terms of their key characteristics, workforce and site needs is an important step in order to identify which of the County's current conditions support the attraction of these industries. This analysis also sets the stage for the preparation of strategies to enhance business attraction, expansion, and retention activities.

4.2 Industry Cluster Targets

The clusters represented in YCEA's original baseline study included those defined by the Commonwealth Center for Workforce Information and Analysis in their report "Pennsylvania's Targeted Industry Clusters." This Industry Assessment Chapter includes a review of ten (10) different clusters. While these clusters do not incorporate all of York County's industries, they do represent areas of the local economy with broad impact.

Results of the 2009 York County Industry Cluster Analysis (conducted by YCEA) have been provided through:

- Shift-Share Analysis – integrated with location quotient analysis, and including more detailed assessments of clusters based on “decision tree” screening; includes more detailed classifications by industry (e.g. current strength, high priority retention target, etc.).
- Input/Output (I/O) Analysis – illustrates output impact by industry using Type II RIMS multipliers.

This assessment, which provides guidance regarding potential target industries, has been incorporated into the projected demand for future office, retail and industrial development in York County. Target industries by detailed classification and associated office, retail and industrial space include those listed in Exhibit 4-1.

Exhibit 4-1: Industry Cluster Targets		
Current Strengths: Strong National Performer, Current Local Specialization	High Priority Retention Targets: Lagging National Performer, Current Local Specialization	Emerging Strengths: Strong National Performer, Not a Current Local Specialization
<ol style="list-style-type: none"> 1. Advanced Materials and Diversified Manufacturing: Vehicle/Vehicle Equipment 2. Logistics/Transportation 	<ol style="list-style-type: none"> 1. Energy 2. Agriculture and Food Production 3. Advanced Materials and Diversified Manufacturing: Metals/Metal Fabrication 4. Advanced Materials and Diversified Manufacturing: Printing 5. Building and Construction 	<ol style="list-style-type: none"> 1. Bio-Medical 2. Health Care 3. Business and Financial Services

These industry clusters have different space requirements. In general, the industry clusters can be grouped by the following space types:

Industrial Space

- Advanced Materials and Diversified Manufacturing: Vehicle and Vehicle Equipment
- Bio-Medical
- Energy
- Logistics and Transportation
- Agriculture and Food Production
- Advanced Materials and Diversified Manufacturing: Metals and Metal Fabrication
- Advanced Materials and Diversified Manufacturing: Printing
- Building and Construction

Office Space

- Health Care
- Business and Financial Services

Other Space (e.g. Agricultural and Institutional)

- Agriculture and Food Production
- Health Care

Knowledge of the growth prospects of these industry cluster targets, along with data on other industries, was used to form analyses of the office, industrial, and retail markets in Chapter V.

To provide insight into the needs of target industry clusters, a snapshot of each industry, including an overview definition, the outlook for that industry at different geographic scales (e.g. Nation, Commonwealth, and County), and key workforce and site selection criteria of firms in the industry has been updated. This information is presented in the following sections by industry cluster.

4.3 Advanced Materials and Diversified Manufacturing: Vehicle and Vehicle Equipment

Current Strength

Industry Overview

The vehicle and vehicle equipment manufacturing industry includes those firms engaged in the production of vehicles and equipment for transport, including automobiles and automobile parts, locomotives, trucks, motorcycles, aircraft and ships for both civilian and military use. Processes involved in production overlap with other manufacturing industries, and include welding, cutting, assembling, and other production techniques.

According to the Bureau of Labor Statistics, the United States vehicle and vehicle equipment industry represents approximately 1.5 million jobs in a variety of occupations, from production workers (including team assemblers; welders, cutters, solderers, and brazers; first-line supervisors; machinists; and coil winders, tapers, and finishers) to engineers (including mechanical, electrical and aerospace), designers and project managers. In November 2008, employment numbers were similar to 2013 as demonstrated in Exhibit 4-2, yet the wage rate was \$24.30 per hour. This represents an increase of approximately 3.8% per year on average. Exhibit 4-3 details the wage and employment information in the vehicle and vehicle equipment manufacturing top occupations.

Exhibit 4-2: National Overview Vehicle and Vehicle Equipment Manufacturing		
North American Industry Classification System (NAICS) Code	336	336
Employment	1.5 Million U.S. November 2008	1.5 Million U.S. August 2013
Wage Rate	\$24.30/hr U.S. November 2008	\$29.33/hr U.S. August 2013

Source: Bureau of Labor Statistics, Industries at a Glance, Transportation Equipment Manufacturing: NAICS 336

**Exhibit 4-3: Top Occupations – May 2012
Vehicle and Vehicle Equipment Manufacturing**

Standard Occupational Code (SOC)	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
51-2092	Team Assemblers	1,006,980	\$13.29	\$14.38	\$29,910	.6%
51-4121	Welders, Cutters, Solderers, and Brazers	329,710	\$17.45	\$18.46	\$38,410	.3%
51-4041	Machinists	388,370	\$18.99	\$19.65	\$40,860	.4%
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	568,820	\$25.98	\$27.61	\$57,420	.2%
51-2021	Coil Winders, Tapers, and Finishers	143,000	\$14.83	\$15.39	\$32,000	1.4%

Source: Bureau of Labor Statistics, Industries at a Glance, Transportation Equipment Manufacturing: NAICS 336

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

According to the U.S. Bureau of Labor Statistics, at the national level, employment in vehicle and vehicle equipment manufacturing is expected to slightly increase over the next decade. The increasingly global nature of competition in the industry has led to a constant need for increased productivity and the use of new technologies. The resulting increased emphasis on lean manufacturing, characterized by streamlined employment and enhanced productivity, is anticipated to contribute to increased employment, particularly in production occupations. Production occupations are expected to increase 2.4% by 2020. In contrast, the need for engineers is expected to decrease 2.4% by 2020 as the industry continues to demand streamlined production techniques. Economic census data from 1997 to 2007 (the most recent year for which Economic Census data has been released) illustrates that employment in transportation equipment manufacturing decreased by nearly 263,000 workers, from 1.8 million in 1997 to 1.5 million in 2007. Though employment decreased, shipments increased as productivity rose, from \$575 billion worth of shipments in 1997 to \$746 billion in 2007.

Pennsylvania

Pennsylvania has recently experienced a decline in vehicle manufacturing employment. In Pennsylvania, as of 2001, there were an estimated 52,000 employees in vehicle and vehicle equipment manufacturing firms. By 2006, the number of employees had decreased again to 45,000, a 13% drop, and showed another drop from 2006 to 2012 to 39,472, another 13%

decrease. The average annual wage for the Advanced Materials and Diversified Manufacturing industry cluster in 2009 was \$52,267 for Pennsylvania.

York County

The Advanced Materials and Diversified Manufacturing cluster experienced many changes in workforce needs over the last ten (10) years due to rapid advancements in production technology. Demand for employees with skills beyond manual dexterity is increasing for production-level positions. Businesses are looking for employees with communication and math skills to fill general positions, such as team assembler. This provides flexibility to train employees to work in teams and perform multiple tasks. Also, this may require a technical degree for some entry-level positions. In order to keep pace with the rapid changes in technology, a flexible workforce with ongoing training programs is important and necessary to the success of business.

Although employment is decreasing and gains in productivity are being experienced, the retirement of the existing workforce over the next ten (10) years will create demand for younger workers. Skilled production workers and those with some type of higher education, particularly with two (2) year degrees in mechanical or electrical technology, and broad skills (e.g. communication, basic math, and problem solving) are preferred by employers.

In fact, York County is the number one County in the Commonwealth for vehicle and vehicle equipment manufacturing. Harley-Davidson Motor Company, which has assembled motorcycles at its York facility since 1973, provides much of York County's employment in this sub-cluster. BAE Systems, another top employer in this sub-sector, assembles armored vehicles for the military's use in Iraq and Afghanistan.

York County's Competitive Position: Key Strengths

1. York County's existing strength in vehicle and vehicle equipment manufacturing, characterized by employers such as Harley Davidson, offers a solid foundation from which to expand the industry.
2. The area offers a local workforce with core manufacturing skills needed by vehicle and vehicle equipment manufacturers.
3. York County is part of the broader mega-region of Philadelphia, Baltimore, and Washington, DC, which affords it access to the human capital (i.e. highly educated workers) in the mega-region. This human capital is a necessary ingredient for vehicle and vehicle equipment research and development to support related manufacturers in York County.
4. York County is a relatively affordable location within the broader mega-region for manufacturing expansion, making it desirable for cost-conscious manufacturers.

4.4 Bio-Medical

Current Strength

Industry Overview

Bio-medical firms produce new therapies, vaccines, and the technologies behind new medicines and processes. The bio-medical sub-cluster includes a variety of industries and sub-industries, from a number of manufacturing types (e.g. pharmaceutical and medicine manufacturing and manufacturing of laboratory and medical office equipment manufacturing) to professional, scientific, and technical services (e.g. physical, engineering and biological research and social science and humanities research) and ambulatory health care services (e.g. medical laboratories and diagnostic imaging centers).

Pharmaceutical and medicine manufacturing firms, a sub-cluster of Bio-Medical, employ an estimated 248,400 in the United States, according to the U.S. economic census of 2007 (the most recent year for which detailed industry data is available). The bio-medical industry employs scientists, engineers, technicians, sales representatives, medical secretaries, and team assemblers (the latter being common in most manufacturing firms). As shown in Exhibit 4-4, employment numbers in the bio-medical industry are similar to 2013, although the wage rate increased in each of the sub-categories. Exhibit 4-5 details the wage rate and employment information for May 2012 in the bio-medical top occupations.

Exhibit 4-4: National Overview Bio-Medical		
NAICS Codes	3254, 3391, 6215, 5471, 333314, 334510	3254, 3391, 6215, 5471, 333314, 334510
Employment	857,600 – NAICS 325 U.S. December 2007	794,900 – NAICS 325 U.S. December 2013
Wage Rate	Varies by Industry – November 2008 \$19.86 for Chemical Manufacturing \$15.46 for Misc. Manufacturing \$28.20 for Professional, Scientific & Technical Services \$20.62 for Ambulatory Health Care Services	Varies by Industry – August 2013 \$21.49 for Chemical Manufacturing \$23.69 for Misc. Manufacturing \$36.47 for Professional, Scientific & Technical Services \$29.60 for Ambulatory Health Care Services

SOURCE: Bureau of Labor Statistics, Industries at a Glance, Chemical Manufacturing: NAICS 325; Miscellaneous Manufacturing: NAICS 339; Professional, Scientific & Technical Services: NAICS: 54; Ambulatory Health Care Services: NAICS 621

**Exhibit 4-5: Top Occupations – May 2012
Bio-Medical**

SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
19-4021	Biological Technicians	72,740	\$19.11	\$20.48	\$42,600	.6%
43-6013	Medical Secretaries	509,640	\$15.07	\$15.71	\$32,670	.3%
41-4011	Sales Representatives, Technical Products	364,830	\$36.04	\$41.20	\$85,690	.7%
51-2092	Team Assemblers	1,006,980	\$13.29	\$14.38	\$29,910	.6%

Source: Bureau of Labor Statistics

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

Growth prospects are high for the bio-medical industry, as demand for new medicines has increased and is expected to continue to increase as the population ages. While many manufacturing sectors are expected to continue to shed jobs as industries transition to streamlined production methods, pharmaceutical and medicine manufacturers continue to add jobs. Illustrative of this trend, Ambulatory Health Care Services NAICS code 621, employment grew from 4.8 million workers in 2003 to nearly 6.4 million workers in 2013. The rate of employment growth in Ambulatory Health Care Services over the next ten (10) years is expected to be similar to the previous ten (10). Projections by the Bureau of Labor and Statistics project a growth of 44.5% by the year 2020. Additionally, employment of pharmacy technicians is expected to increase by 32% from 2010 to 2020, much faster than the average for other specific occupations in this sector.

The bio-medical industry is less susceptible to national economic downturns than other industries. As such, it should withstand the current recession as the population continues to age and public and private health insurance programs continue to evolve.

Pennsylvania

According to the Center for Workforce Information & Analysis, Pennsylvania, while initially slow to capitalize on its advantages in the biotechnology fields, has grown in recent years,

especially in the southeast. Most notably, Montgomery County has an employment concentration in this cluster five (5) times the national average. Many state-of-the-art, postsecondary research and development programs, and an abundance of pharmaceutical companies, make Pennsylvania a perfect incubator for growing biomedical and life science firms. The technological demands of these fields require an educated and creative workforce.

The largest portion of occupations in the Bio-Medical cluster is held by physicians and surgeons, primarily employed by medical laboratories and imaging centers, followed by biological technicians. The pharmaceutical preparation manufacturing, research and development in biotechnology, and research and development in the physical, engineering, and life sciences industries accounted for more than 55% of this cluster's jobs. Top bio-medical employers in Pennsylvania in 2008 included Merck & Company Incorporated, Wyeth-Ayerst Pharmaceuticals, SmithKline Beecham Corporation, Sanofi Pasteur, and Quest Diagnostics.

York County

In the 2009 Cluster Analysis (the most recent data available), York County's Bio-Medical cluster made up 1% of the labor force, employing 1,553 people. The location quotient for this cluster was 0.16 and 134 jobs were added between 2006 and 2009.

The location quotient (LQ) is a measure of the concentration of an industry in the local economy. If the LQ is greater than 1, it suggests that the local industry is more concentrated locally than in the comparison economy (state or nation), and there may be some competitive advantage. For instance, if a LQ is more than 1, products and services from that industry are being exported out of York County. If the LQ is less than 1, it indicates that the industry may not be as strong locally as in the comparison economy. Therefore, businesses and people in York County need to import products and services in that industry from outside the County's geographic boundaries.

According to the shift-share analysis, the Bio-Medical cluster was a lagging performer, with limited prospects due to declining competitiveness, in comparison to the State and nation. However, the location quotient indicates that there may be potential for future growth. York County was also ranked the most cost effective location in the Northeastern and Mid-Atlantic United States for medical device manufacturing in a 2011 Boyd Company study.

Firms with a concentration in medical devices in the County include, but are not limited to, dental equipment and supplies manufacturing, dental laboratories manufacturing, electro-medical and electrotherapeutic, ophthalmic goods manufacturing, pharmaceutical preparation manufacturing, and surgical appliance and supplies manufacturing.

York County's Competitive Position: Key Strengths

1. York County has an existing base of bio-medical firms from which to grow.
2. York County's location, relatively close to major concentrations of bio-medical firms in Montgomery and Chester Counties outside Philadelphia, offers a competitive advantage.
3. The County, as part of the broader mega-region that includes Philadelphia, Baltimore, and Washington, DC, has access to world-class research universities, Federal laboratories, and a highly-educated workforce needed for bio-medical expansion.
4. York County is cost-advantaged vis-à-vis the region, with lower-cost land and real estate, which is desirable to larger-scale, established pharmaceutical manufacturers.
5. York County's manufacturing workforce provides the skills needed for production workers involved in pharmaceutical manufacturing.

4.5 Energy

Current Strength

Industry Overview

The Energy cluster includes industries associated with the production and distribution of energy, as well as the waste disposal industries associated with the remediation and environmental cleanup related to energy production. The Energy cluster includes a wide variety of industries, from petroleum refineries to battery manufacturing to generator manufacturing. Brief summaries of each of the main sources of renewable energy are offered below:

- **Solar power:** Solar power generation comes from two (2) key technologies: solar photovoltaics (PV) and solar thermal/concentrated solar power. Solar cells, which use semiconductors to absorb light, are used in solar PV to convert sunlight to electricity.
- **Wind power:** Wind power generation systems use a wind turbine, gearbox, generator, tower and transmission equipment to harness the energy created by moving air. Across the nation, wind farms are concentrated primarily in Texas and California. The Midwestern and Western states of Iowa, Minnesota, North Dakota and South Dakota also have ambitious projects underway to store wind energy underground.
- **Geothermal power:** Geothermal systems convert hydrothermal fluids to electricity through dry steam, flash, or binary cycle technologies. Geothermal electricity production requires location of facilities near geothermal resources, including volcanic activity, tectonic shifting, hot springs and geysers. Most of these resources in the United States are concentrated in the Rocky Mountain West.

- **Hydroelectric power:** Hydroelectric dams harness the energy created by running water. Infrastructure to harness this particular source of energy are much more established in the United States than other sources of renewable energy, and most locations suitable for hydrodams have already been developed with such facilities.
- **Biomass and biofuels:** Biomass, also termed waste-to-energy, uses forest and agricultural wastes, municipal solid wastes, and landfill gas as fuel to power existing electrical systems. The two (2) main biofuels are ethanol and biodiesel, both of which are produced in plants. Ethanol is grain alcohol produced from corn or other crops which is blended with gasoline and used as motor fuel. Some ethanol plants are owned by groups of farmers or local investors. Biodiesel is made from vegetable oils and animal fats as an alternative to petroleum-based diesel fuel.

The Bureau of Labor Statistics has not identified NAICS codes that encompass the energy industry. Therefore, employment estimates in the energy sector are difficult to quantify. However, the Center for Workforce Information & Analysis, Pennsylvania Department of Labor & Industry, has defined the renewable energy industry cluster as a combination of manufacturing sub-industries. These include, but are not limited to, the following NAICS sectors: crude petroleum and natural gas extraction (211111); hydroelectric power generation (221111); oil and gas pipeline construction (237120); mining machinery and equipment manufacturing (333131); ethyl alcohol manufacturing (325193); petroleum refineries (324110); turbine generator and generator set units (333611); motor and generator manufacturing (335312); solid waste combustors and incinerators (562213); and utility regulation and administration (926130).

Outlook

National

Interest in renewable energy development is strong and increasing, as global demand for energy has increased and is expected to grow as population and incomes rise. The energy industry offers potential for rapid growth and development of renewable projects, as the United States transforms its energy infrastructure to become less reliant on non-renewable sources and foreign oil. Policy initiatives, including renewable portfolio standards and incentives for the siting, production, and operation of renewable energy facilities have played a major role in the emergence of the renewable energy industry. Portfolio standards mandate that utility companies include a certain proportion of power plant generation or capacity from renewable sources (e.g. California's requirement that electric companies use renewable sources to produce 20% of electricity). Most states offer incentives, through rebates or grants, for renewable energy projects. With interest in renewable energy growing, such policy initiatives should only increase in the future.

At the national level, the U.S. Census data shows that NAICS code 333611, turbine and turbine generator manufacturing, had an employment increase of 20.7% from 2002 to 2007. NAICS

code 562213, solid waste combustors and incinerators, also had an employment increase nationally of 24.6% in the same time period.

Pennsylvania

In 2007, Pennsylvania Governor Edward G. Rendell enacted an Energy Independence Plan focused on expansion of Pennsylvania's energy production, including emphasis on development of alternative fuel and clean energy. According to the PA Department of Environmental Protection report in 2013, *Energy in Pennsylvania: Past, Present, and Future*, Pennsylvania ranks second in the U.S. in terms of electricity generation. It is also the number one exporter of electricity in the Country. The average existing wind facility in Pennsylvania generates 131,000 megawatt hours, according to a 2011 listing of 15 wind facilities in Pennsylvania.

Pennsylvania's goal is to effectively work with citizen's groups, businesses, trade organizations, local governments, and communities to help reduce pollution and save energy. Part of that effort includes encouraging the deployment and use of innovative environmental and advanced energy technologies, including renewable energy. State level programs include, but are not limited to: Keystone HELP Residential Energy Efficiency Program, Geothermal Loan Program, Green Energy Loan Fund, Growing Greener, Alternative Fuel Incentive Grant Program, Small Business Loan Program, Small Business Advantage Grant, and the Pennsylvania Energy Development Authority (PEDA). More information about these programs can be found at www.depweb.state.pa.us

In 2013, the PA Department of Environmental Protection announced that the Pennsylvania Sunshine Solar Program will provide \$100 million in rebates to help fund solar electric (solar photovoltaic, or PV) and solar hot water (solar thermal) projects for homeowners and small businesses in Pennsylvania. As of October 25, 2013, the PA Sunshine Program had \$1,173,580 available for payment of rebates. Similar to the national level in this industry sector, the U.S. Census data shows an employment increase for the solid waste combustors and incinerators industry of 6.4% from 2002 to 2007.

York County

According to the 2009 York County Cluster Analysis, the most recent data available, York County's Energy cluster made up 3% of the labor force, employing 3,538 people. Locally, the cluster gained employment from 2006 to 2009 with the addition of 327 jobs. The location quotient was 1.28.

When compared to the nation, the Energy cluster was a lagging performer, however, it was worth investment in resources as a high priority retention target. Thus, the Energy Cluster was a current strength when compared to the State according to the shift-share analysis. The County already contains two (2) of the nation's top hydroelectric turbine manufacturers, American Hydro and Voith Siemens Hydro, laying a solid base for growth.

York County's Competitive Position: Key Strengths

1. York County is already a strong manufacturing area, with a workforce well-suited for renewable energy component production, and with two (2) of the nation's top manufacturers of hydroturbines.
2. York County is part of the broader mega-region of Philadelphia, Baltimore, and Washington, DC, and is within driving distance of its world-class research universities and Federal laboratories. Collectively, the mega-region's universities spend \$4 billion on research and development and offer 40,000 graduate students.
3. Agricultural heritage is strong in York County, and the existing base of agriculture, food production, and machinery manufacturing industries offers an advantage for biofuels production.
4. York County is already strong in metals and metal fabrication manufacturing, indicating that the County has firms and workers experienced in manufacturing of other components similar to those used in Solar energy, wind energy, and geothermal component manufacturing. These existing firms may be able to use their existing workforce to transition into the renewable energy sector.
5. New or expanding firms can take advantage of the incentives offered as part of Pennsylvania's Energy Independence Plan.
6. York County has a number of large manufacturers and logistics providers with large roof surfaces, which could provide demand for local installation of electricity-producing solar panels. This would provide firms with a reliable source of power to supplement local electric utilities.

4.6 Logistics and Transportation

Current Strength

Industry Overview

Logistics and transportation firms are involved in the storage, warehousing, and distribution of goods that other industries produce. Logistical services include the management and processing of inventory. Transportation services provide distribution of inventory via multiple modes of transport (e.g. air, rail, water, road and pipeline).

According to the Bureau of Labor Statistics, in August 2013, the United States logistics and transportation industries represented approximately 4.5 million jobs in a variety of occupations (Exhibit 4-6). NAICS codes 48-49 consist of the following subsectors: Air Transportation, Rail Transportation, Water Transportation, Truck Transportation, Transit and Ground Passenger Transportation, Pipeline Transportation, Scenic and Sightseeing Transportation, Support

Activities for Transportation, Postal Services, Couriers and Messengers, and Warehousing and Storage. Exhibit 4-7 details the wage and employment information, for May of 2012, in the transportation and warehousing top occupations.

Exhibit 4-6: National Overview Transportation and Warehousing		
NAICS Codes	48-49	48-49
Employment	4.4 Million U.S. November 2008	4.5 Million U.S. August 2013
Wage Rate	\$18.57/hr – U.S. November 2008	\$22.36/hr – U.S. August 2013

Source: Bureau of Labor Statistics, *Industries at a Glance*

Exhibit 4-7: Top Occupations – May 2012 Transportation and Warehousing						
SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
53-3032	Truck Drivers, heavy	1,556,510	\$18.37	\$19.40	\$40,360	.3%
53-7062	Laborers and material movers	2,143,940	\$11.49	\$12.70	\$26,410	.3%
53-7051	Industrial truck and tractor operators	496,570	\$14.53	\$15.43	\$32,090	.5%
53-3033	Truck drivers, light	769,010	\$14.13	\$16.32	\$33,940	.3%
53-7064	Packers & packagers, hand	660,670	\$9.57	\$10.80	\$22,470	.3%

Source: Bureau of Labor Statistics, *May 2012 National Occupational Employment and Wage Estimates*

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

Employment in the transportation and warehousing sector is projected to grow by 20% from 2010 to 2020. However, since growth prospects for the industry are closely tied to the broader national economy, consumer demand is linked to demand for product shipping.

The U.S. Census data shows an employment increase in the transportation and warehousing industry sector from 3.6 million in 2002 to 4.4 million in 2007, an increase of 22%. Additionally, the number of establishments has increased by 10.1% in the same time frame.

Other occupations in the transportation and warehousing sector that are projected to have a growth of 20% or more by 2020 include, but are not limited to: Training and Development Specialists, Market Research and Analysts, Aerospace Engineers, Computer Occupations, Industrial Engineers, Chemists, Life Scientists, and Water Transportation Workers.

Occupations projected to have a decline of 20% or more include, but are not limited to: Petroleum Engineers, Electrical Drafters, Switchboard Operators, Meter Readers, Utilities, and miscellaneous Plant and System Operators.

Pennsylvania

According to the PA Department of Labor and Industry, Pennsylvania is a key transportation corridor of the Northeast. Ports, rail systems and highways make PA highly competitive in the warehousing and shipment of goods. As these services become increasingly mechanized, a qualified workforce is vital to development efforts.

General warehousing and storage dominate all other industries in this cluster. Not only is general warehousing and storage the largest industry in Logistics and Transportation, job volumes increased more than 15%, while the next largest industry, couriers, declined. More than one (1) out of every three (3) occupations in the cluster is that of a truck driver, including both heavy- and light-truck drivers. As of 2008, this industry sector for Pennsylvania attributed 162,194 total jobs.

Large-scale logistics and transportation employers in Pennsylvania include United Parcel Service Incorporated, Federal Express Corporation, Wal-Mart Associates Incorporated, YRC Incorporated, FedEx Ground, and NBC Philadelphia Merchants.

York County

In 2009, York County's Logistics and Transportation cluster made up 5% of the labor force, employing 5,661 people. Logistics and transportation has been a natural strength for York County due to its proximity to major markets and a strong transportation network. In 2011, York

County saw growth in this industry sector with an increase in employment to 7,962 people, a 29% increase.

FedEx Ground and ES3 LLC are among the 50 largest York County employers and leaders in the industry. ES3 specializes in distribution activities (e.g. storage, shipping, and selection) for multiple manufacturers in a single location, and boasts the ability to ship products to customers in a 24 hour turnaround time.

York County's Competitive Position: Key Strengths

1. York County offers a strategic location, with interstate and rail access to the mega-region that spans Philadelphia, Baltimore, and Washington, DC.
2. York County offers an existing base of logistics and transportation firms and workers from which to build expansion and recruitment efforts.
3. York County is relatively lower-cost and less built-out than other areas in the broader mega-region, offering an advantage for logistics and transportation firms sensitive to land and transportation costs.
4. The logistics/transportation sector is a supportive industry to the growth of other industries. As York County diversifies and expands its manufacturing sectors, the logistics/transportation sector also should have opportunities to expand.
5. The Port of Baltimore recently underwent an expansion with approximately \$250 million invested into the project in anticipation of the widening of the Panama Canal. This gives Baltimore and Norfolk an edge over similar west coast ports, such as Port of Los Angeles and Port of Long Beach.

4.7 Agriculture and Food Production

High Priority Retention Target

Industry Overview

The agriculture and food production industries include establishments involved in food systems. This includes all activities from the growing of crops and raising of animals to the processing of agricultural products by food manufacturers. These manufacturers then distribute products to consumers through support industries (e.g. warehousing, storage, and retail).

According to the Bureau of Labor Statistics, the United States key agriculture and food production industries (e.g. the agriculture, forestry, and fishing, and food manufacturing sectors) employ an estimated 1.5 million workers in 2012 (Exhibit 4-8). In Pennsylvania, industries that support these key production sectors include, but are not limited to: retail, storage and warehousing. They provide the bulk of employment for cashiers, stock clerks and order fillers,

packers and packagers, food preparation workers, and laborers and material movers. Exhibit 4-9 details the wage and employment information in the agriculture and food production top occupations.

Exhibit 4-8: National Overview Food & Agriculture Production		
NAICS Code	311	311
Employment	1.5 Million – Food Manufacturing U.S. November 2006	1.5 Million – Food Manufacturing U.S. November 2012
Wage Rate	\$15.53/hr – Food Manufacturing U.S. November 2006	\$17.97/hr – Food Manufacturing U.S. November 2012

Source: Bureau of Labor Statistics

Exhibit 4-9: Top Occupations – May 2012 Agriculture and Food Production						
SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
41-2011	Cashiers	3,314,010	\$9.12	\$9.79	\$20,370	.3%
43-5081	Stock clerks & order fillers	1,806,310	\$10.60	\$11.75	\$24,440	.2%
53-7064	Packers & packagers, hand	660,670	\$9.57	\$10.80	\$22,470	.3%
35-2021	Food preparation workers	785,370	\$9.28	\$10.05	\$20,910	.4%
53-7062	Laborers & material movers	2,143,940	\$11.49	\$12.70	\$26,410	.3%

Source: Bureau of Labor Statistics, May 2012 National Occupational Employment and Wage Estimates

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

Total occupation in the Food Manufacturing industry sector is expected to increase by only 1.6% between 2010 and 2020, while employment of food preparation workers is projected to grow 10% during this period. Job opportunities are expected to increase because of the need to replace the large number of workers who leave the occupation each year. Technology advances, which have allowed for the automation of farming and food production practices, are the main reason behind these employment trends. In the agricultural sector, increasingly productive machinery and greater use of science, including biotechnology, have allowed for enhanced crop and animal yields with fewer workers. Also, prices for agricultural goods have not generally kept pace with increases in the cost of farming, which has not allowed farmers to hire as much farm labor as in the past. In order to reduce costs, many farms have consolidated into large-scale farms to achieve greater economies of scale (and reduced cost per unit of production).

In the food production sector, intense competition among firms has led manufacturers to increasingly invest in new technologies and machinery to enhance production. As a result, fewer production workers will be needed, but workers with technical skills will instead be in demand. Demand for food processing is expected to increase as the population increases, and as time-pressed consumers have increasingly opted for convenient, processed foods. The food production industry is less susceptible to recessions than other industries, since demand for food generally remains constant.

Pennsylvania

According to the U.S. Department of Agriculture Statistics Service, the market value of agriculture products sold in Pennsylvania is more than \$5.8 billion annually. The growth of food processing firms creates an important supply chain with significant potential for growth. It is important for the Commonwealth to explore the workforce needs of this critical industry cluster and training programs.

Agriculture and Food Production has historically been an integral part of Pennsylvania's economy. An abundance of job opportunities exist in this cluster, with many requiring on-the-job training and minimal experience. Two (2) industries in this cluster, confectionary manufacturing from cacao beans and mushroom production, have concentrations that are greater than ten (10) times the national average and were among the highest location quotients of any industries that comprise the State's 11 clusters. Industries in this cluster tend to be concentrated near the food production centers and major highways in the central and southern portions of the State.

Although, the U.S. Census Economic Snapshot showed an employment decrease from 71,069 in 2002 to 67,966 in 2007, the data also shows a 26.1% increase in value of shipments.

Large-scale employers in the Commonwealth include Hershey Foods Corporation; Cargill Meat Solutions; Hatfield Quality Meats, Incorporated; Kraft Foods, Incorporated; Knouse Foods Cooperative, Incorporated; and Moyer Packing Company. Many of these large employers are located in the southeastern part of the Commonwealth, which offers access to transportation networks and customers in the northeast and mid-Atlantic regions.

York County

York County offers many large food manufacturers and contains a strong farming heritage, with active farms in operation throughout the County (particularly in the southeastern region). Compared to the rest of Pennsylvania, the agriculture and food production industry has fared better in York County over the past several years, though employment has declined. At the end of 2009, this cluster's location quotient was 1.6 and made up 7% of the labor force, employing 7,344 people. Between 2006 and 2009, the Agriculture and Food Production cluster experienced an increase in workforce by 408. York County continued to be a net exporter in this cluster.

Major agriculture and food production employers in the County include Giant Foods, Utz Quality Foods, Weis Markets, United Natural Foods, Snyder's–Lance, CHR Corporation, Hanover Foods Corporation, Starbucks Roasting Plant, and D.F. Stauffer Biscuit Company. York County is also situated next to Lancaster County, which is among the Commonwealth's top three (3) counties in terms of agriculture and food production employment.

York County's Competitive Position: Key Strengths

1. York County is a leader in the food production and agriculture industry, and existing major employers, such as Utz Quality Foods, Starbucks, Snyder's of Hanover, and others, offer a strong foundation for the industry.
2. The emergence of the renewable energy sector, with its emphasis on biofuels in York County, offers a potential opportunity for existing farmers to transition into renewable-energy related activities.
3. York County offers fertile land and cohesive agricultural areas, particularly in the southeastern part of the County, which can be strengthened.
4. The County's location in the relatively affluent and educated mega-region that encompasses Philadelphia, Baltimore, and Washington, DC offers opportunities to attract day-trippers with agritourism (e.g. bed and breakfasts, corn mazes, farmers markets).

[4.8 Advanced Materials and Diversified Manufacturing: Metals and Metal Fabrication](#)

High Priority Retention Target

Industry Overview

Three (3) broad industry categories comprise the metals/metal fabrication sub-cluster: primary metal manufacturing, fabricated metal product manufacturing, and machinery manufacturing.

Firms in the primary metal manufacturing industry transform raw metals to basic metal products and wire, rod, sheet, strip or bar metal. Firms engaged in fabricated metal product manufacturing create intermediate or end products from metal, such as architectural elements and hand tools. Firms involved in machinery manufacturing use multiple metal forming processes to produce machinery. Processes involved in metal fabrication and manufacturing include smelting, refining, forging, bending, forming, stamping, machining, welding and assembling. Metals manufacturing is linked to many other manufacturing industries, as metal is a main intermediate good used in everything from vehicle and vehicle equipment manufacturing to medical devices and the energy industry.

Primary metal, fabricated metal product, and machinery manufacturers employ an estimated 3.9 million workers in the United States, according to the Bureau of Labor Statistics. In August of 2013, the machinery manufacturing subsector (NAICS code 333) employed 1.1 million people (Exhibit 4-10). Occupations in these industries include both professional and production positions including engineers, technicians, managers, and production and assembly workers. Exhibit 4-11 details the wage and employment information for August 2013 in the metals and metal fabrication top occupations.

Exhibit 4-10: National Overview Metals/Metal Fabrication		
NAICS Code	331, 332, 333	331,332,333
Employment	1.2 Million – NAICS 333 U.S. November 2008	1.1 Million – NAICS 333 U.S. August 2013
Wage Rate	\$17.97/hr U.S. November 2008	Varies by Industry – U.S. August 2013 \$25.24/hr for Primary Metal Manufacturing \$21.75/hr for Fabricated Metal Products \$26.26/hr for Machinery Manufacturing

Source: Bureau of Labor Statistics, Industries at a Glance, Primary Metal Manufacturing: NAICS 331; Fabricated Metal Product Manufacturing: NAICS 332; and Machinery Manufacturing: NAICS 333

**Exhibit 4-11: Top Occupations – May 2007
Metals/Metal Fabrication**

SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
51-4041	Machinists	388,370	\$18.99	\$19.65	\$40,860	.4%
51-1011	First-Line Supervisors/Managers of Production & Operating Workers	568,820	\$25.98	\$27.61	\$57,420	.2%
51-4031	Cutting, Punching & Press Machine Operators	182,570	\$14.27	\$14.95	\$31,090	.5%
51-2092	Team Assemblers	1,006,980	\$13.29	\$14.38	\$29,910	.6%
51-4011	Computer-Controlled Machine Tool Operators	138,870	\$17.10	\$17.70	\$36,810	.5%

Source: Bureau of Labor Statistics, May 2012 National Occupational Employment and Wage Estimates

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

According to the Bureau of Labor and Statistics, *Industries at a Glance*, employment in the primary metal industry sector is expected to increase slightly between 2010 and 2020 by 1.6%. Metal fabrication is expected to increase significantly more by 11.8% between 2010 and 2020. However, the machinery manufacturing industry sector is expected to decline by 1.5% during this time period.

In the U.S. Census Industry Snapshot, the fabricated metal manufacturing subsector showed an increase in employment nationally from approximately 1.5 million in 2002 to 1.6 million in 2007; a 2.4% increase. Additionally, data shows an increase of 39.7% in the value of shipments.

The recent nationwide economic recession could also contribute to reduced employment. The metal industry and, in particular, the steel industry component are linked to the production of materials used in construction, vehicle and vehicle equipment manufacturing, and household appliances. Since consumer spending drives activity in these industries, they, and the metal industry, are more susceptible to economic downturns. Machinery manufacturing is also susceptible in that firms tend to delay purchases of new machinery during times of economic uncertainty.

However, an increased interest in energy production, from both the non-renewable and renewable standpoints, offers a bright spot for the metals manufacturing sector despite the national recession. On the non-renewable side, as refinery, power plant, and pipeline projects increase to accommodate the expanding nuclear, natural gas, and shale oil industries, each will require steel for production. The expanding solar and wind industries also will make use of metals industry suppliers. Makers of solar panels require metal frames for the panels and metal tubes for solar receiver products, thus solar panel manufacturers should provide demand for metals manufacturers. The wind industry, which also requires metals, offers strong potential for expansion, particularly in the southwestern states of New Mexico and Texas. Finally, as interest in the fuel savings associated with rail increase, rail companies are investing in expanded infrastructure that will require metals.

Pennsylvania

According to the Pennsylvania Department of Labor & Industry's Center for Workforce Information & Analysis, major technological advances have changed the nature of manufacturing nationwide. Metal and plastics production are increasingly automated, while technological breakthroughs have created increased demand in the areas of powdered metals and chemicals. Although many of these advances have resulted in job losses in the more manual occupations, the demand for highly skilled workers has increased. For Pennsylvania to maintain its manufacturing advantage, its workforce development system must provide programs that enable workers to shift into technology-driven manufacturing jobs and enable employers to increase productivity.

Despite a steady decline in manufacturing employment, Advanced Materials and Diversified Manufacturing still provides more than 315,000 jobs, with average annual wages 20% above the Statewide average. The 2006 to 2008 period was particularly tough on manufacturing jobs, with increased competition stemming from reduced overseas production costs. Although jobs in Advanced Materials and Diversified Manufacturing have decreased overall, notable growth has occurred in certain industries, such as specific types of plastics manufacturing. Jobs in various aspects of the steel industry have also increased following decades of decline.

According to the U.S. Census Industry Snapshot, fabricated metal manufacturing showed a .1% increase in employment from 92,024 in 2002 to 92,144 in 2007, while machinery manufacturing showed a 3.7% increase in employment from 54,855 in 2002 to 56,867 in 2007.

This industry's largest employers in Pennsylvania include: General Electric Company, The Boeing Company, R. R. Donnelley & Sons Company, Harley Davidson Motor Company, Cardone Industries Incorporated, and BAE Systems Land & Armaments L.P.

York County

The Advanced Materials and Diversified Manufacturing cluster was York County's second largest cluster in the 2009 Industry Cluster Analysis, involving 484 firms and over 16,039 workers, representing 16% of the labor force with a location quotient of 1.87. By 2012, employment in the 31-33 industry sectors in York County totaled 31,791 with a total of 599 manufacturing establishments.

York County is among the top several counties in Pennsylvania in terms of employment in metals and metal fabrication. Top employers in the County include, but are not limited to: R.H. Sheppard, Inc., New York Wire, Harley Davidson Motor Company, and BAE Systems Land & Armaments L.P.

York County's Competitive Position: Key Strengths

1. York County offers a workforce skilled in manufacturing, and an extensive concentration of metals and metal fabrication manufacturing that is important to retain.
2. Though the industry is contracting in terms of employment nationally and locally, the need for new technologies to streamline production provides a need for engineers and educated workers. York is competitively situated within the broader mega-region of Philadelphia, Baltimore, and Washington, DC with its access to such educated workers.
3. York County offers opportunities for expansion of the renewable energy industry, which will require the services of metals and metal fabrication manufacturers. Such potential expansion of the energy sector offers an opportunity for metals and metal fabrication manufacturers to transition into producing new goods and using new technologies to support renewable energy development.
4. The County's strong inventory of existing industrial parks is an important selling point for firms that desire locations in industrial areas.

4.9 Advanced Materials and Diversified Manufacturing: Printing

High Priority Retention Target

Industry Overview

The printing industry includes firms engaged in printing text and images on to paper, metal, glass, apparel, and other materials. There are three (3) distinct phases to printing: prepress, press (or output), and post-press (or finishing), which are often performed by the same company. The printing activities of newspapers are not included, but instead are included as part of the publishing industry.

According to the Bureau of Labor Statistics, the United States printing industry represented approximately 445,000 jobs in 2013, most of which are in the following occupations: printing machine operators, bindery workers, prepress technicians and workers, and job printers, as well as first-line supervisors and managers of production and operating workers (Exhibit 4-12). Exhibit 4-13 details the wage and employment information in the printing industry top occupations.

Exhibit 4-12: National Overview Printing		
NAICS Code	323	323
Employment	584,900 – U.S. November 2008	445,000 – U.S. August 2013
Wage Rate	\$16.98/hr – U.S. November 2008	\$22.31/hr – U.S. August 2013

Source: Bureau of Labor Statistics, *Industries at a Glance, Printing and Related Support Activities: NAICS 323*

Exhibit 4-13: Top Occupations – May 2012 Printing						
SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
51-5112	Printing Press Operators	173,010	\$16.68	\$17.35	\$36,090	.5%
51-5113	Print Binding & Finishing	52,960	\$14.30	\$15.17	\$31,560	.8%
51-5111	Prepress Technicians & Workers	41,420	\$17.91	\$18.76	\$39,020	.9%
53-7063	Machine Feeders & Offbearers	105,790	\$13.04	\$13.79	\$28,680	.7%
51-9198	Helpers – Production Workers	419,840	\$10.96	\$11.84	\$24,620	.4%

Source: Bureau of Labor Statistics May 2012 National Occupational Employment and Wage Estimates

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

Between 2010 and 2020, printing employment is estimated to fall by 4.8% nationally. Key trends behind declining employment are an increased use of technology that has reduced need for printing. More companies are performing printing activities in-house, and more printing products are being imported today than in the past.

Comparison of the most recent U.S. economic census data illustrates the industries past declines. In 1997, there were 5,000 more printing and related support activities establishments than in

2002 and a further decline to the most recent data in 2007 with additional loss of almost 4,000 establishments. In 2007, the U.S. Census Industry Snapshot listed the total number of related establishments at 33,817, a decrease of 9.9% from 2002. Employment declined at a similar pace as the average firm size decreased by 9.7%. Between 2002 and 2007, actual employment decreased from 834,404 in 1997 to 715,777 in 2002 and down to 646,183 in 2007. But, in comparison, the value of shipments showed an increase of 7.6% from 2002 to 2007.

Pennsylvania

Pennsylvania benefits from both strong transportation and distribution networks and abundant natural wood resources that give printing and related support activities a competitive advantage. Pennsylvania is home to a number of global firms, many of which are concentrated in the south central and southeastern regions.

However, in terms of employment change, Pennsylvania, like the nation as a whole, has been losing jobs in printing and related support activities over the past few years. The U.S. Census shows that NAICS code 323 had an employment loss of 11.4% from 2002 to 2007 in Pennsylvania, from 45,391 to 40,210 jobs, a loss of 5,181 jobs. This signals a mature industry that is losing some ground relative to other states, though still surviving.

York County

In 2011, the U.S. Census data showed that 2,159 persons were employed in printing and related support activities in 44 total printing and related support activities establishments in York County. However, the data also shows a loss of 979 employees since 2007, as well as a loss of five (5) establishments. The County's largest printing and related support activities employer is the P.H. Glatfelter Company, ranked 15th among all County employers in terms of employment.

York County's Competitive Position: Key Strengths

1. York County has a strong existing base of printing firms and workers to retain.
2. The County's transportation network, with interstate and rail connections, offers access to the broader mega-region (e.g. Philadelphia, Baltimore, and Washington, DC).
3. York County is cost-advantaged, with relatively lower land cost than other areas in the broader mega-region, which is appealing to larger-scale, industrial-type printing operations.

4.10 Building and Construction

High Priority Retention Target

Industry Overview

Building and construction firms construct and engineer the infrastructure and real estate that services other industries and residents. Homes, offices, factories, institutions, transportation systems and utility systems are created, expanded, altered, repaired and maintained by building and construction firms. There are three (3) broad categories of firms in the industry: 1) general contractors, who construct buildings (NAICS code 236); 2) heavy and civil engineering construction contractors, who build major infrastructure projects such as sewers, roads, highways, bridges and tunnels (NAICS code 237); and 3) specialty trade contractors, who offer specialized construction services (e.g. plumbing, heating and air conditions, electrical, painting, carpentry, etc. (NAICS code 238). In 2013, the nation's building and construction firms employed an estimated 5.8 million workers in a variety of occupations, from construction managers to carpenters, electricians and laborers (Exhibit 4-14). Exhibit 4-15 details the wage rate and employment information for May 2012 in the buildings and construction top occupations.

Exhibit 4-14: National Overview Building & Construction		
NAICS Code	23	23
Employment	7 Million – U.S. November 2008	5.8 Million – U.S. August 2013
Wage Rate	\$22.21/hr – U.S. November 2008	\$26.27/hr – U.S. August 2013

Source: Bureau of Labor Statistics, *Industries at a Glance*

Exhibit 4-15: Top Occupations – May 2012 Buildings and Construction						
SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
47-2031	Carpenters	567,820	\$19.20	\$21.41	\$44,520	.4%
47-2061	Construction Laborers	814,470	\$14.42	\$16.58	\$34,490	.4%
47-2111	Electricians	519,850	\$23.96	\$25.50	\$53,030	.5%
47-2152	Plumbers, Pipefitters, & Steamfitters	340,370	\$23.62	\$25.46	\$52,950	.5%
47-1011	Supervisors – Construction & Extraction	456,640	\$28.70	\$30.40	\$63,230	.2%

Source: Bureau of Labor Statistics, *May 2012 National Occupational Employment and Wage Estimates*

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

The building and construction industry is strongly linked to the business cycle, and when economic downturns occur, this industry is among the first affected when developers and firms cancel or put a hold on construction projects. State and local governments can also impact building and construction firms when they cancel infrastructure construction and maintenance projects in the face of budgetary constraints.

In the economic depression since 2007, the construction of new housing nationwide had fallen to its lowest level. Over a ten (10) year period, from 2003 to 2013, the Department of Labor & Industries data shows 7.7 million persons employed as its highest in the construction sector in April 2006 and a low of 5.4 million persons employed in January 2011. As of September 2013, there were a total of 5.8 million persons employed in the construction industry in the nation.

However, nationwide population growth is expected to continue, and demand for new housing, retail, and office development will inevitably return once supply and demand reach equilibrium. The children of baby boomers, the echo boom, are reaching the age when many households buy their first home, which could create demand for new housing. Remodeling of existing homes could also increase in the near-term as demand for new homes slows, creating opportunities for specialty construction firms. Employment of construction laborers and helpers is expected to grow 25% from 2010 to 2020, faster than the average for other occupations in this sector, according to the Bureau of Labor & Statistics. Those with the most skills should have the best job opportunities.

Demand for nonresidential construction, including schools and nursing homes, will likely result from aging baby boomers, and industrial infrastructure will need to be built or replaced (many industrial plants are in need of replacement or remodeling, which has been delayed in the past). Renewable energy projects also will provide need for building and construction services, and governmental policies to invest in infrastructure projects could help the industry succeed through the downturn.

Pennsylvania

Pennsylvania's building and construction firms employ nearly 350,000 workers, according to Commonwealth estimates, which include the manufacturing of equipment for construction, such as heating and air conditioning machinery. As the housing market saw tremendous declines, Building and Construction was one of the clusters most impacted by the recession, with more than 10,000 jobs lost between 2006 and 2008. While the downward trend has showed signs of slowing, there are increased skill needs for Building and Construction workers now and in the future. As Pennsylvania, along with the rest of the country, continues to move toward an overall

greener economy, new opportunities (weatherizing homes, installing energy efficient heating and cooling systems, or using greener building materials) are apparent in this cluster.

Additionally, a large portion of the jobs in this cluster require only short to long-term on-the-job training, as opposed to a time consuming and costly four (4) year degree. Despite the short educational commitment for obtaining these jobs, a large portion of them still pay a family-sustaining wage, making careers in this cluster appealing to many individuals who either cannot afford, or otherwise do not find themselves attracted to, a college education.

According to the Pennsylvania Department of Labor & Industry, major employers in Pennsylvania in this sector include Grove US LLC, Kinsley Construction, JLG Industries LLC, Johnson Controls International, and Pennsy Supply Incorporated. Most of the Commonwealth's building and construction jobs are located in the Philadelphia and Pittsburgh regions, near major population centers.

York County

York County's Building and Construction cluster comprised 14% of the labor force, employing 14,231 people according to the 2009 Industry Cluster Analysis, the most recent data available. The cluster's location quotient increased from 1.31 in 2006 to 1.59 in 2009. However, the industry lost 1,707 jobs during that time. According to the shift share analysis, the Building and Construction cluster was a poor performer in 2009. Though the industry had a strong location quotient, growth potential was limited due to external trends compared to the State and nation.

Major employers in this sector in the County include Kinsley Construction, a major full-service general contracting firm serving the Mid-Atlantic region, and Johnson Controls, a manufacturer of heating, ventilation and air conditioning equipment.

York County's Competitive Position: Key Strengths

1. York County offers a strong base of building and construction firms and workers, with large employers, such as Kinsley Construction, calling York County home.
2. The emergence of the renewable energy sector in York County and Pennsylvania could offer opportunities for the transitioning of workers into new, renewable-energy related specialties. Construction firms also will be needed to support the construction of renewable energy facilities, such as ethanol and biodiesel plants.
3. The building/construction sector is tied to the prosperity and growth of other industries in the surrounding region, and to population growth. With York County offering opportunities for growth of pharmaceutical manufacturing and renewable energy component manufacturing, there should be opportunities for firms to specialize in such construction.

4.11 Health Care

Emerging Strength

Industry Overview

The health care industry includes establishments and organizations that provide ambulatory health care, hospitals, and nursing and residential care facilities. Included in the industry are organizations that provide social assistance, as well as health care services. This sector includes both health care and social assistance because it is difficult to distinguish between the boundaries of these two (2) activities. Many of the industries in this sector are defined based on the educational degree held by the practitioners included in the industry.

As of August 2013, the United States health care industry employed an estimated 17.4 million workers (Exhibit 4-16) in an estimated 850,000 establishments, making it one of the nation's largest industries. The vast majority of establishments are the offices in the private industry sector. Exhibit 4-17 details the wage rate and employment information in the health care industry top occupations.

Exhibit 4-16: National Overview Health Care		
NAICS Code	62	62
Employment	16 Million – U.S. November 2008	17.4 Million – U.S. August 2013
Wage Rate	\$19.46/hr – U.S. November 2008	\$24.97/hr – U.S. August 2013

Source: Bureau of Labor Statistics, Industries at a Glance

Exhibit 4-17: Top Occupations – May 2012 Health Care						
SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
29-1141	Registered Nurses	2,633,980	\$31.48	\$32.66	\$67,930	.3%
29-1069	Physicians & Surgeons	308,410	N/A	\$88.86	\$184,820	1.0%
31-1015	Orderlies,	53,920	\$11.53	\$12.35	\$25,700	.6%
29-2061	Licensed Practical & Vocational Nurses	718,800	\$19.97	\$20.39	\$42,400	.2%
43-4171	Receptionists & Information Clerks	966,150	\$12.49	\$13.00	\$27,050	.2%
29-1051	Pharmacists	281,560	\$56.09	\$55.27	\$114,950	.7%

Source: Bureau of Labor Statistics, May 2012 National Occupational Employment and Wage Estimates

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

The Bureau of Labor & Industries data states that the health care industry is projected to grow faster than all other industries over the next decade, approximately 5.7 million new jobs, a 32.7% increase, are projected for 2020.

Employment of medical records and health information technicians is expected to increase by 21% from 2010 to 2020, faster than the average for all occupations in this sector according to the Bureau of Labor & Statistics Occupational Outlook Handbook. The demand for health services is expected to increase as the population ages. An aging population will need more medical tests, treatments, and procedures. This will also mean more claims for reimbursement from private and public insurance. Additional records, coupled with widespread use of electronic health records by all types of healthcare providers, could possibly lead to an increased need for technicians to organize and manage the associated information in all areas of the healthcare industry.

Technology improvements in diagnostic testing and surgical procedures, many resulting from bio-medical research and manufacturing, will also allow more services to occur in less expensive outpatient and home settings than in inpatient facilities. New technologies also will allow for the treatment of previously untreatable illnesses, resulting in a need for more workers to administer treatment.

Pennsylvania

Like other parts of the nation, health care in Pennsylvania is a rapid growth industry, and projected to continue to grow as the Commonwealth's population ages. Health care is also the Commonwealth's largest industry, with approximately 28,000 establishments and nearly 815,000 workers, according to Pennsylvania's Center for Workforce Analysis in 2008. A workforce shortage of health care workers, in particular, certified nursing assistants, licensed practical nurses, nursing home and home care workers, has presented a major need for recruitment and retention of these workers.

Health Care is exploding throughout Pennsylvania. The top three (3) industries in this cluster represent nearly 54% of all health care jobs, with general medical and surgical hospitals providing nearly one (1) in three (3) jobs. Although the cluster's average wage is just slightly higher than Pennsylvania's statewide average, certain occupations, such as registered nurses and pharmacists, earn significantly more than the average.

The Commonwealth's large-scale employers in the health care industry include UPMC Presbyterian, Heartland Employment, The Children's Hospital of Philadelphia, Western Pennsylvania Hospital, University of Pennsylvania, and Pennsylvania Blue Shield. However, the vast majority of health care jobs are located in small establishments that employ less than 50

workers. Health care employment in the Commonwealth is distributed similarly to population, with many health care jobs located in populated centers, such as Philadelphia and Pittsburgh.

York County

York County's Healthcare cluster was the largest sector comprising 18% of the labor force, employing 18,869 people in 2009. A location quotient of 0.74 indicated that the healthcare needs of the local population could not be met by the existing network of providers within the County. From 2006 to 2009, 4,203 jobs were created in the Healthcare cluster. Despite those positive gains, the nation outpaced local growth. When compared to the State, the Healthcare cluster was an emerging strength for York County with potential for future growth, according to the shift-share analysis.

Large health care employers in York County include York Hospital, Hanover General Hospital, Memorial Hospital, Wellspan Medical Group, and Wellspan Health.

York County's Competitive Position: Key Strengths

1. The aging and growth of the population in York County, including in-migration of retirees, will generate additional demand for health care.
2. York County's health care sector employment grew more rapidly than that of the Commonwealth and nation, testament to the emergence of this industry in the County.
3. Demand for retirement communities in York County offers an opportunity for health care facilities integrated with housing.

4.12 Business and Financial Services

Emerging Strength

Industry Overview

Financial and insurance firms provide a wide range of services to facilitate financial transactions. The industry can be broadly divided into three (3) sectors: 1) banking; 2) insurance; and 3) securities, commodities and other investments. According to the Bureau of Labor Statistics, the United States finance and insurance industries (Exhibit 4-18) represent approximately 6 million jobs in a variety of occupations, from tellers and loan officers to accountants, auditors, and insurance sales agents. In addition, monetary authorities charged with monetary control are included in this sector. Exhibit 4-19 details the wage and employment information, for August 2013, in the business and financial services industry top occupations.

Exhibit 4-18: National Overview Business and Financial Services		
NAICS Code	52	52
Employment	6 Million – U.S. November 2008	6 Million – U.S. August 2013
Wage Rate	\$21.69/hr – U.S. November 2008	\$29.55/hr – U.S. Second Quarter 2013

Source: Bureau of Labor Statistics, *Industries at a Glance*

Exhibit 4-19: Top Occupations – May 2012 Business & Financial Services						
SOC	Title	Wage Estimates				
		National Employment	Median Hourly Wage	Mean Hourly Wage	Mean Annual ¹	Mean RSE ²
43-9061	General Office Clerks	2,808,100	\$13.21	\$14.07	\$29,270	.2%
43-3071	Tellers	541,770	\$11.99	\$12.40	\$25,790	.2%
43-4051	Customer Service Representatives	2,299,750	\$14.70	\$15.92	\$33,110	.2%
37-2011	Janitors & Cleaners	2,097,380	\$10.73	\$11.95	\$24,850	.3%
33-9032	Security Guards	1,046,420	\$11.52	\$13.10	\$27,240	.4%

Source: Bureau of Labor Statistics, *May 2012 National Occupational Employment and Wage Estimates*

¹Assumes year-round, full-time equivalent of 2,080 hours and hourly mean wage.

²Relative standard error (measure of reliability of survey statistic)

Outlook

National

Within the financial and business services sector, securities, commodities, and investments have been projected to grow 14.2% by 2020, compared to the insurance claims industry at 7.8%. From 2002 to 2007, the number of finance and insurance establishments in the nation rose by 14%.

The Bureau of Labor & Industries Occupational Outlook states that employment of insurance underwriters is expected to increase 6% from 2010 to 2020, slower than the average for this sector. New types of automated underwriting software allow workers to process applications quicker than before, reducing the need for underwriters. Employment of financial examiners is projected to grow 27% from 2010 to 2020, faster than the average for all occupations in this sector. New regulations will likely create a need for an increase in examiners. Additionally, employment of personal financial advisors is projected to grow 32% from 2010 to 2020, significantly faster than the average for occupations in general. As large numbers of baby

boomers approach retirement age, they will seek planning advice from personal financial advisors.

Pennsylvania

The Business and Financial Services cluster is diverse and concentrated in the southwest and southeast area of the State. Many larger businesses could not exist without the support services offered by smaller companies.

This cluster continues to be a major employer in the Commonwealth. Nearly one (1) out of every eight (8) Pennsylvania jobs are business and financial services, for a total of 673,612 jobs. While many of the industries within this cluster, such as commercial banking and offices of real estate agents and brokers, have a presence in virtually every community in the State, other niche industries are concentrated near Pennsylvania's urban financial centers. One such industry is open-end investment funds, which has a Statewide concentration ten (10) times the national average.

Large-scale employers in this industry cluster include PNC Bank, WellsFargo, Vanguard Group, MBNA Institutional PA Services, Citizens Bank of Pennsylvania, and Allied Barton Security Services.

York County

In the 2009 cluster analysis, York County's Business and Financial Services cluster totaled 13% of the labor force, employing 13,177 people. The location quotient was 0.65, indicating that York County was a net importer of the goods and services provided under this cluster. Despite adding 4,319 jobs between 2006 and 2009, the cluster was a lagging performer compared to the nation. The cluster was an emerging strength for York County when compared to the State, according to the shift-share analysis. Residential and employment growth in York County has contributed to the expansion of business and financial service sector positions.

York County's Competitive Position: Key Strengths

1. York County's population is aging, and the area is a destination for retirees from Maryland because of Pennsylvania's favorable income tax laws for retirees and the County's strategic location at the Maryland-Pennsylvania border. The expansion of retirees in York County could create opportunities for local financial planning firms.
2. The business/financial services sector is largely a supportive industry. Therefore, the growth of other sectors, such as bio-medical, energy, health care, and defense contracting linked to this sector, will offer opportunities for spin-off business and financial services growth.

3. York County is strategically situated within driving distance of Philadelphia and Baltimore, both of which have financial services clustered in their central business districts. While near-term prospects for these large financial establishments to expand are poor, over the long-term, their potential resurgence could provide long-term opportunities for “back-office” administrative and support functions in York County.

4. York County offers a relatively lower cost of doing business than other areas in the broader mega-region, which enhances its desirability to “back-office” business and financial services support firms.

4.13 Summary

York County’s business attraction, retention and expansion efforts should target the industries profiled in this chapter with 1) attraction efforts geared to both current strengths (e.g. those industries that are both current local specializations and growing at the national level, which include vehicle and vehicle equipment manufacturing, bio-medical, energy, and logistics/transportation) and emerging strengths (e.g. those industries not currently local specializations, but exhibiting growth at the national level, which include health care and business and financial services); 2) retention geared to both current strengths and high priority retention targets (e.g. those industries that are current local specializations, but not growing at the national level, which include agriculture and food production, metals and metal fabrication manufacturing, printing, and building and construction); and 3) expansion geared to current strengths.

While York County offers many strong selling points from which to attract the target industry clusters described in this chapter, there are three (3) industry clusters which bear special attention for economic development because of their resiliency to economic downturns. These industry clusters include:

- Renewable Energy (solar, wind, geothermal, hydroelectric, biomass and biofuels) – The outlook for this industry cluster is bright. Interest is strong and increasing as the United States transforms its energy infrastructure to become less reliant on non-renewable sources and foreign oil. Policy initiatives, including those that require utility companies to require a certain proportion of power from non-renewable sources, as well as incentives, offer strong promise for expansion of the industry.
- Bio-Medical – As the population ages and expands, leading to demand for new medicines, growth prospects are high for this sector. The growth of public and private health insurance programs also has increased demand for this industry’s products. Illustrative of this trend, pharmaceutical and medicinal manufacturers have added jobs, while other manufacturers have streamlined production and cut staff.
- Health Care – The aging and expansion of the population are main ingredients behind this industry’s growth. Outpatient and home care facilities are at the forefront of the

industry's growth opportunities as new technologies emerge from the bio-medical sector that allow for diagnostic testing and some surgical procedures to occur in less expensive outpatient and home settings.

Given the growth of these industries in York County and their resiliency in times of economic uncertainty, it is recommended that they are given priority as targets, even though a comprehensive and diversified business recruitment, retention, and expansion effort is needed to address all of the targeted industry clusters.

There are several key considerations to keep in mind when reflecting on these industries:

- First, there are **many interrelationships between the industry cluster targets**. For example, renewable energy is linked to metals and metal fabrication, since these firms manufacture solar panel and wind turbine components; building and construction, since these firms install solar panels and wind turbines and construct plants for biofuel production; agriculture and food production, since agricultural enterprises provide feedstock and waste for biofuels; and the logistics and transportation sector, since these firms distribute energy and components to major markets. For the metals and metal fabrication, building and construction, and agriculture and food production industries, renewable energy offers an opportunity for transitioning into new opportunities, thereby enhancing the odds for retention and expansion of these high priority retention targets.
- **An educated workforce is a critical input** to most of these industry clusters. A diverse and skilled workforce is needed to attract those industries that require skilled technicians and engineers (most manufacturing industries) to those requiring Ph.D.'s (bio-medical firms).
- Some industries **depend on growth of population and other industries** to thrive. For example, the health care, business and financial services, building and construction, and logistics and transportation industries each depend on growth of people and firms for expansion.

It is important to note, that although a focused target of the above clusters is considered a priority, the attraction, retention, and expansion efforts should not be short-sighted. Economic development professionals should be prepared to address all industry sectors for growth opportunities.

Chapter V

Market and Land Assessment

5.1 Overview

To frame the assessment of available and suitable land for economic development, an assessment of market demand was undertaken to establish broad, countywide parameters for future non-residential space – essentially, a ten (10) year “economic development program” for the County. These projections are based on an understanding of baseline trends and target industries (as understood through York County’s industry cluster analysis work, which was last updated in 2009). The projections are limited to a ten (10) year timeframe because, beyond that window, it becomes very difficult to predict economic conditions.

Local stakeholders have noted that York County tends to have more managed growth than other regions, which in part has helped the County to be less susceptible to national downturns than other areas that experience rapid growth and concentration of jobs in single industries. The updated overview of the economic development program for York County over the next ten (10) years is based on the market projections of demand for office, industrial, and retail space. This development, if realized, could occur through the adaptive reuse of existing space, as well as through the creation of new space. Exhibit 5-1 below shows the projected demand for office, industrial, and retail space to the year 2018.

Exhibit 5-1: York County Ten Year Economic Development Program (Net New Space Demand in Square Feet: 2008 to 2018)			
	Office (SF)	Industrial (SF)	Retail (SF)
Baseline Growth ¹	458,250	-396,000	2,059,511

Source: York County Planning Commission – Projections

¹ Based on baseline trends in employment and household growth

Potential future average building sizes by type were also identified based on current averages and recent deliveries (available at the regional level). These averages may be used in conjunction with local zoning codes and allowable floor area ratios (FARs) to identify the likely parcel size needed for a prototypical new building. A range of potential future building sizes are provided in Exhibit 5-2.

Exhibit 5-2: Average Building Size (Square Feet)		
	Current (York County)	Recent Deliveries (York County)
Office	12,000	12,572
Industrial	78,000	342,638
Retail	18,000	19,525

Source: CoStar

These types of development will vary in footprint and stories by individual building, but some illustrative graphics of prototypical building types by size and scale is offered below (Exhibits 5-3, 5-4, and 5-5). Also described are smaller-scale retail and office specifications, which are a main priority for many of York County’s smaller municipalities, especially those with small-scale older buildings suitable for adaptive reuse. Finally, the land needs of renewable energy producers are described (e.g. biofuel plants and wind farms).

Office:

- For very small offices, 1,000 to 5,000 square feet (represents many small-scale medical practitioners offices, which require 1,200 to 1,500 square feet for the first physician and another 1,000 to 1,200 square feet for each additional physician).
- For small offices, 5,000 to 15,000 square feet (represents size to accommodate roughly 20 to 50 employees).
- For mid-size offices, 15,000 to 125,000 square feet (represents size to accommodate roughly 50 to 500 employees).
- For large offices, more than 125,000 square feet (represents size to accommodate 500+ employees).

Exhibit 5-3: Prototypical Office Development



1,500 square feet



19,380 square feet



30,519 square feet

Industrial:

- Up to 25,000 square feet for small firms with less than 50 employees (represents most bio-medical firms, which are small and tend to locate in flex industrial space).
- Approximately 25,000 to 250,000 square feet for medium size employers with less than 500 employees, but more than 50 (represents many renewable energy component manufacturers).
- For large employers, from 250,000 to over 500,000 square feet (accommodates firms with over 1,000 employees, similar to some large bio-medical manufacturers, as well as large distribution facilities which may require over one (1) million square feet of space).

Exhibit 5-4: Prototypical Industrial Development



57,980 square feet



126,000 square feet



385,886 square feet

Retail:

- For very small retailers, 1,000 to 5,000 square feet per establishment.
- For neighborhood centers offering convenience goods (such as groceries), 30,000 to 150,000 square feet (typical size is less than 100,000 square feet).
- For community centers providing daily necessities along with some apparel and specialty store space, 100,000 to 300,000 square feet (typical size is 150,000 square feet).
- For power centers providing “big box” style stores, 250,000 to one (1) million square feet, with at least 25,000 square feet per store.
- For regional centers offering general merchandise, apparel, furniture and home furnishings (typical mall shopping center), 400,000 to 800,000 square feet.

Exhibit 5-5: Prototypical Retail Development



5,549 square feet



122,748 square feet



632,000 square feet

Land for Renewable Energy Production:

- For biofuels plants, 40 to 80 acres on average, with most small plants comprising less than ten (10) acres, and large plants requiring 150 acres.
- For wind farms, one half (1/2) acre per turbine.

A description of the industry cluster assessment and more detailed analysis used to identify the economic development program and average building sizes is provided in Chapter IV, Industry Assessment.

5.2 Office Analysis

Demand for future office space in York County will likely occur as a result of baseline growth of office-based employment identified through recent trend data. To quantify the depth of this potential demand, Basile Baumann Prost & Associates, Inc. (BBPC) originally considered employment growth trends provided by York County through the industry cluster assessment (2001 to 2009 data by industry). Current employment densities were used to estimate future demand for space. The updated statistics and projections are presented in Exhibits 5-6 through 5-11.

Exhibit 5-6: Estimated Current Office Employment by Industry Sector York County 2001 to 2013				
Industry Title	Estimated Employment (2001)	Estimated Employment (2009)	Annual Growth Rate (2001 to 2009)	Estimated Employment (2013)
Health Care ¹	1,299	1,887	4.8%	2,276
Business and Financial Services	11,490	13,177	1.7%	14,096
Information & Communication	3,668	3,654	-.05%	3,347
Total	16,457	18,718	1.3%	19,719

Source: York County 2009 Industry Cluster Analysis

¹ Assumes 10% of health care employment is located in office rather than institutional space

Exhibit 5-7: Current Average Building Size (York County) 2013 (2nd Quarter)	
Total Office Space in Square Feet	6,964,604
Occupied Square Feet	6,325,241
Total Buildings	588
Rounded Average Building Size in Square Feet	12,000

Source: CoStar

Exhibit 5-8: Average Building Size of Recent Office Deliveries York County 2008 – 2013 (2nd Quarter)			
Year	Buildings	Rentable Building Area Square Feet	Average Building Size
2008	2	41,600	20,800
2009	2	8,000	4,000
2010	0	0	0
2011	1	5,830	5,830
2012	0	0	0
2013 (2 nd Quarter)	1	20,000	20,000
Total	6	75,430	12,572

Source: CoStar

Exhibit 5-9: Projected Future Office Employment by Industry Sector York County			
Industry Title	2013 Employment Data	Annual Growth Rate 2013- 2018	Projected Employment 2018
Health Care (Portion)	2,276	4.8%	2,877
Business & Financial Services	14,096	1.7%	15,336
Information & Communication	3,347	-0.05%	3,339
Total	19,719	1.8%	21,552

Source: York County 2009 Industry Cluster Analysis

Exhibit 5-10: Future Baseline Space & Employment Conditions York County 2018	
Net New Office-Based Employment	1,833
Future Square Feet Per Employee	250
Net Square Feet Demanded in Square Feet ¹	458,250

Source: York County Planning Commission

¹Assumes 250 square feet per employee, based on national industry standards

Exhibit 5-11: Future Office Space Demand in Square Feet York County 2018	
Net New Office Space Demanded By Employees	458,250
Average New Office Space Demanded Per Year	91,650
Annual Office Space Growth	1.8%

Source: York County Planning Commission

5.3 Industrial Analysis

Similar to the office sector, demand for future industrial space in York County will likely result from growth of industrial-based employment identified through recent trend data, as well as through the employment growth that may occur as a result of retention and recruitment of target industries. Existing employment density, measured through comparison of current industrial inventory and industrial-based employment, was used to predict future demand for space as a result of employment growth. These predictions show that the future demand for industrial space is essentially unchanged. Growth in industries, such as agriculture and bio-medical, has been offset by shrinkage in advanced material and diversified manufacturing and labor and paper industries. Exhibits 5-12 through 5-17 show the updated statistics and projections.

Exhibit 5-12: Estimated Current Industrial Employment by Industry Sector York County 2001 to 2013				
Industry Title	Estimated Employment (2001)	Estimated Employment (2009)	Annual Growth Rate (2001 to 2009)	Estimated Employment (2013)
Ag and Food Production	4,710	7,344	5.7%	9,167
Advanced Materials & Diversified Manufacturing	21,707	16,039	-3.7%	13,794
Bio-Medical	1,206	1,553	3.2%	1,762
Building & Construction	15,353	14,231	-0.9%	13,726
Energy	4,456	3,538	-2.8%	3,158
Logistics & Transportation	5,146	5,661	1.2%	5,938
Lumber, Wood, & Paper	5,297	3,868	-3.9%	3,299
Total	57,875	52,234	-1.3%	50,844

Source: York County 2009 Industry Cluster Analysis

Exhibit 5-13: Current Average Building Size York County 2013 (2nd Quarter)	
Total Industrial Square Feet	57,775,935
Occupied Square Feet	55,034,815
Total Buildings	736
Rounded Average Building Size in Square Feet	78,000

Source: CoStar

**Exhibit 5-14: Average Building Size of Recent Deliveries
York County 2008 – 2013 (2nd Quarter)**

Year	Buildings	Rentable Building Area Square Feet	Average Building Size
2008	5	849,861	169,972
2009	4	2,151,160	537,790
2010	1	165,000	165,000
2011	1	603,000	603,000
2012	0	0	0
2013 (2 nd Quarter)	0	0	0
Total	11	3,769,021	342,638

Source: CoStar

**Exhibit 5-15: Projected Future Industrial Employment by Industry Sector
York County 2018**

Industry Title	2013 Employment Data	Annual Growth Rate 2013- 2018	Projected Employment 2018
Ag and Food Production	9,167	5.7%	12,095
Advanced Materials & Diversified Manufacturing	13,794	-3.7%	11,424
Bio-Medical	1,762	3.2%	2,063
Building & Construction	13,726	-0.9%	13,119
Energy	3,158	-2.8%	2,740
Logistics & Transportation	5,938	1.2%	6,303
Lumber, Wood, & Paper	3,299	-3.9%	2,704
Total	50,844	-0.2	50,448

Source: York County 2009 Industry Cluster Analysis

**Exhibit 5-16: Future Space & Employment Conditions
York County 2018**

Industrial Based Employment	-396
Occupied Square Feet/Employee	1,000
Occupied Square Feet Lost ¹	-396,000

Source: York County Planning Commission

¹Assumes 1,000 square feet per employee based on 2013 rounded average

Exhibit 5-17: Future Industrial Space Demand in Square Feet York County 2018	
Net New Industrial Space Demanded by Employees	-396,000
Average New Industrial Space Demanded Per Year	-79,200
Annual Industrial Space Growth	-0.14%

Source: YCPC

5.4 Retail Analysis

In contrast to the office and industrial sectors, which are most heavily influenced by employment growth, retail demand is tied most closely to household growth. Projected growth of households was used to estimate future demand for retail space. The current ratio of retail space to households was used to predict the new retail likely to be demanded by new households. Updated information and projections are provided in Exhibits 5-18 through 5-21.

Exhibit 5-18: Projected Demand for Retail Space in Square Feet Based on Future County Household Growth				
Year	Estimated/Projected Households ¹	Retail Space per Household	Filled Retail Space ²	Change in Retail Space
2008	168,763	100	16,829,952	-
2013	188,162	92	17,241,261	411,309
2018	209,791	92	19,300,772	2,059,511

¹Estimated/Projected Households based on 2.2% average annual compounded increase between 2008 and 2011

²Filled Retail Space Based on CoStar Data 4th Quarter 2008 through 2nd Quarter 2013

Exhibit 5-19: Current Average Building Size and Occupancy York County 2nd Quarter 2013	
Total Retail Space in Square Feet	18,841,788
Total Buildings	1,063
Rounded Average Building Size in Square Feet	18,000
Occupied Square Feet	17,241,261

Source: CoStar

Exhibit 5-20: Average Building Size of Recent Deliveries York County 2008-2013 (2 nd Quarter)			
Year	Buildings	Rentable Building Area Square Feet	Average Building Size
2008	6	27,766	4,628
2009	5	113,173	22,635
2010	5	43,122	8,624
2011	7	250,853	35,836
2012	2	53,200	26,600
2013 (2 nd Quarter)	0	0	-
Total	25	488,114	19,525

Source: CoStar

Exhibit 5-21: Future Retail Space Demand in Square Feet York County 2018	
Net New Retail Space Demanded By Households	2,059,511
Average Retail Space Demanded Per Year	91,797
Annual Retail Space Growth	2.3%

Source: York County Planning Commission

5.5 Land Assessment

York County’s ability to realize the level of development supported by market demand will in part hinge on the availability of suitable sites for development. To screen for and prioritize potential development sites, a land availability and suitability analysis was performed using GIS tools. The land assessment consisted of a two (2) step process. First, a screen was applied, reducing the approximately 169,000 parcels in the County to 387 that were generally available for economic development. Next, additional criteria were used to prioritize those 387 parcels based on their suitability for development.

Land Availability

A parcel was considered available for economic development if it met the following criteria, based on geographic information system (GIS) data provided by YCPC:

1. All or part of the property is within an Established Growth Area identified in the Growth Management Plan component of the County Comprehensive Plan.
2. All or part of the property has appropriate industrial or commercial zoning based on a general description of each zoning classification.
3. The property is three (3) buildable acres or larger. Buildable area was determined by subtracting “out of play” areas, such as wetlands and floodplains, from the total parcel size.
4. The property is vacant or underutilized. This criterion was determined by evaluating the assessed value of buildings and land for each property. If the improvement (building)

value was zero, the property was considered vacant. If the improvement value was less than half the assessed value of the land, the property was considered underutilized.

To verify the availability of parcels meeting the four (4) GIS criteria listed above, each property was visually evaluated using overhead and oblique aerial photographs, such as Google Maps and Microsoft Virtual Earth. Some parcels that met the GIS criteria were found to be utilized for other uses, such as schools, parks, churches, and cemeteries. Others were found to be actively under development. Both of those types of parcels were excluded from further analysis. Anecdotal information from municipalities and utility service providers was also used to identify parcels not available for development.

Land Suitability

To prioritize the 387 available properties for potential economic development, three (3) criteria were used.

1. The property has good access to transportation. Properties meet this criterion if they are located within one (1) mile of an uncongested major arterial highway as defined in the Transportation Plan component of the County Comprehensive Plan. Parcels immediately adjacent to active rail lines also meet this criterion.
2. All or part of the property is within an Established Primary Growth Area identified in the Growth Management Plan component of the County Comprehensive Plan.
3. Water and sewer are generally available for development of the property. This highly subjective criterion was addressed with the assistance of water companies, sewer authorities, and other utility providers throughout the County. “Generally available” means that there are no systemic constraints, such as treatment plant capacity, to providing water and sewer for a proposed development. However, developers may need to make spot improvements for water and sewer service, such as extending sewer lines to their properties or constructing an elevated tank to ensure adequate water pressure.

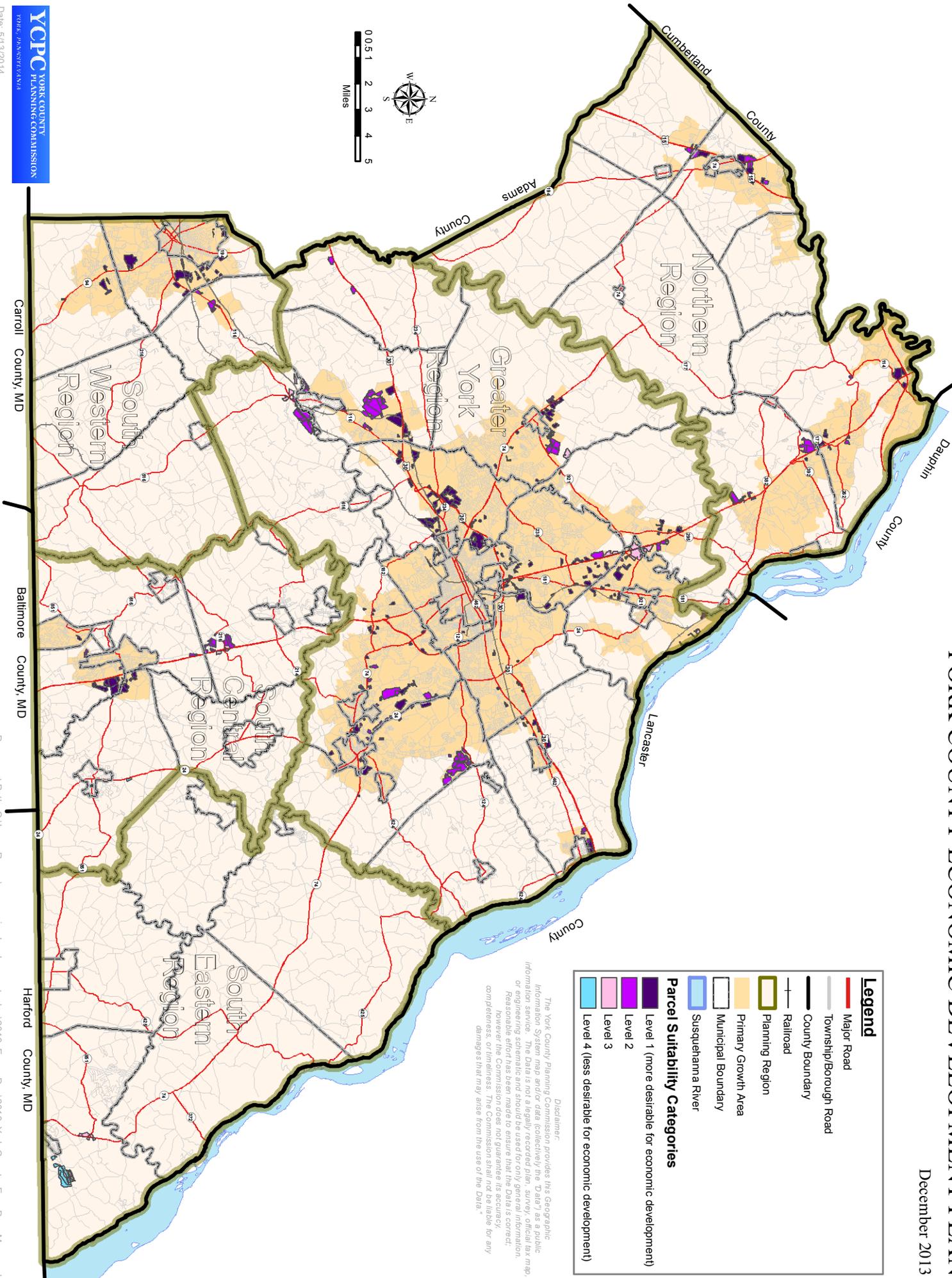
Consideration of these three (3) criteria results in four (4) priority levels for the County’s consideration in economic development activities. Level 1 properties are most suitable for development.

- Level 1: all three (3) criteria are met (247 properties)
- Level 2: any two (2) criteria are met (107 properties)
- Level 3: any one (1) criterion is met (24 properties)
- Level 4: none of the criteria are met (9 properties)

Based on this analysis, almost 75% of the available parcels (247 out of 387) are considered most suitable for development. The results of the countywide land assessment are depicted in Exhibit 5-22.

YORK COUNTY ECONOMIC DEVELOPMENT PLAN

December 2013



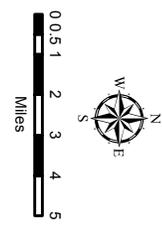
Legend

- Major Road
- Township/Borough Road
- County Boundary
- Railroad
- Planning Region
- Primary Growth Area
- Municipal Boundary
- Susquehanna River

Parcel Suitability Categories

- Level 1 (more desirable for economic development)
- Level 2
- Level 3
- Level 4 (less desirable for economic development)

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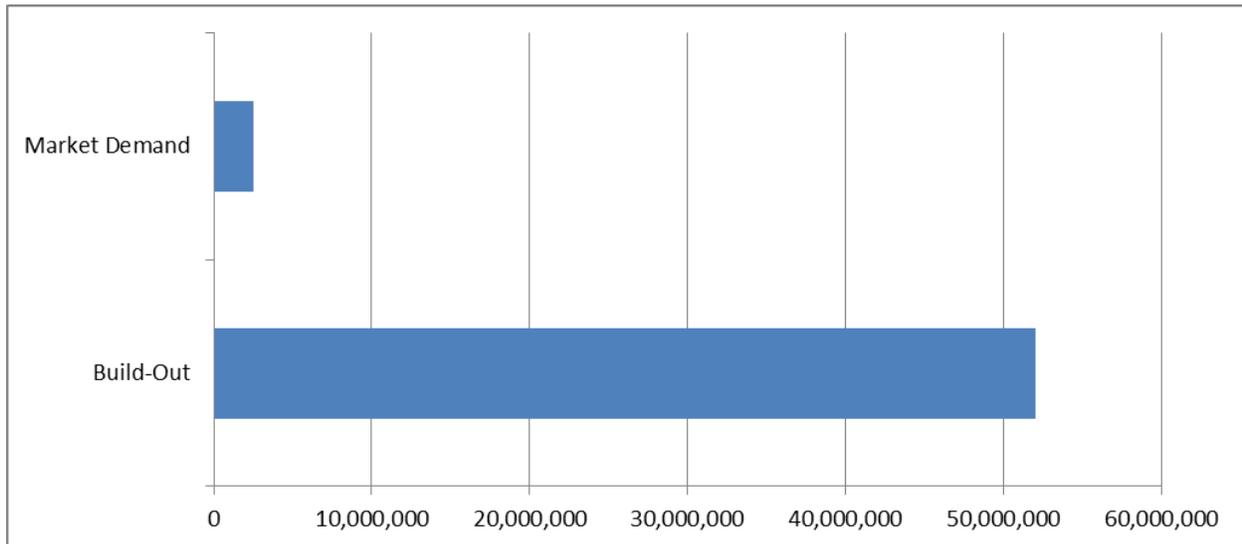


5.6 Market Demand and Land Supply in Comparison

At the broad County level, there appears to be a surplus of land to accommodate demand for economic development over the next ten (10) years. Consider the following:

- Market projections identified demand for 2.5 million square feet of office, retail and industrial space (Exhibit 5-23).
- With approximately 6,632 office, retail, and industrial acres identified as available and suitable for development as a result of the multi-step screening process (before prioritization), and assuming a conservative 40% infrastructure deduction and floor area ratio of 0.30, the build-out of these parcels would accommodate approximately 52 million square feet (Exhibit 5-23).
- If all the 2.5 million square feet of development demanded by the market were attracted to the County, the land supply would still be able to accommodate an additional 49.5 million square feet of office, retail and industrial development.

Exhibit 5-23: Build Out of Available and Suitable Land and Market Demand for Economic Development by Square Feet



Market demand and supply may also be compared at the Planning Region level. First, the market demand must be allocated by region. Several methods may be employed to allocate demand. These include:

1. Tying the market allocation to the current job share: In this method, each Planning Region's share of Countywide office, retail and industrial jobs is estimated. The market allocation would then equal the job share, with the assumption that future trends will match existing patterns. For example, if the Northern Region has 7.6% of office, retail and industrial jobs, it would be assumed to capture 7.6% of future office, retail and industrial development (and associated jobs).
2. Linking the market allocation to available/suitable land share: Under this approach, each Region's share of Countywide office, retail and industrial acres identified as available and suitable for development is calculated. These shares are based on the results of the multi-step screening process before prioritization of sites. The market allocation would equal the available/suitable land share, which would assume that each Region would attract development proportionate to its share of sites available and suitable to accommodate such development.
3. Connecting the market allocation to prioritized land share: In this method, each Region's share of Countywide prioritized office, retail and industrial acres is identified. This method assumes that areas with sites preferred for development, because of their location in primary growth areas, proximity to transportation facilities/interchanges (and not in congested areas), and availability of public sewer and water, will be more likely to attract development before other areas lacking such characteristics.
4. Relating the market allocation to a hybrid share using qualitative knowledge of the Planning Regions: This hybrid approach involves a review of each Region's unique position for economic development, including its existing shares of jobs, available/suitable land, prioritized land, and its goals and desires for economic growth. This method incorporates the insight of municipal officials, community members, and staff of the YCPC and YCEA.

Ultimately, the hybrid method was used to allocate market demand by Planning Region because it takes multiple factors and the qualitative insight of stakeholders into account. As such, it offers a strong blend of quantitative and qualitative reasoning to identify possible market outcomes. Exhibits 5-24 and 5-25 demonstrate the results of this analysis, including the projected market allocations.

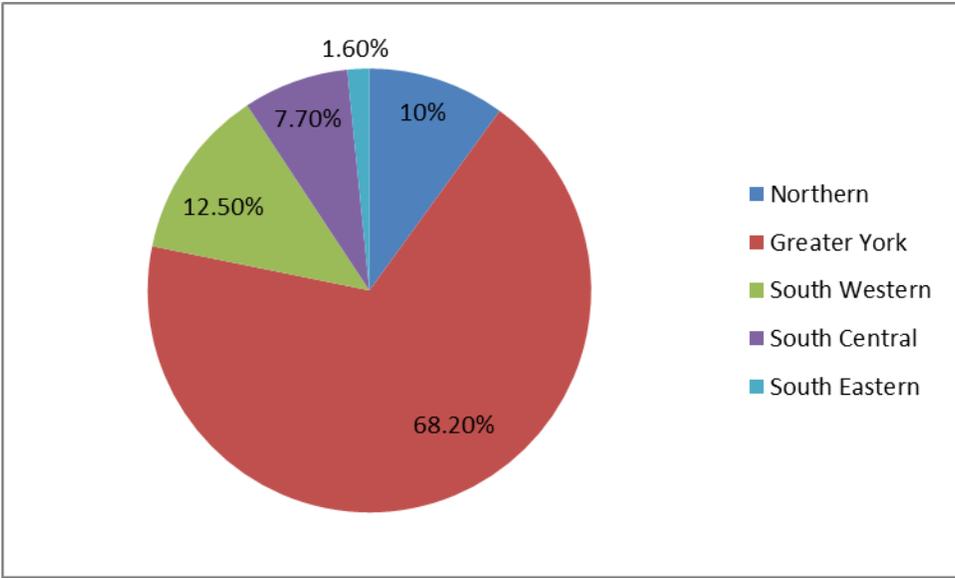
Exhibit 5-24: Market Allocation – Hybrid Method Land Assessment						
Planning Region	Total Acres	Percent of Total	Most Desirable Acres	Percent of Total	Job Share ¹	Market Allocation ²
Northern	784	11.8%	379	10.6%	7.6%	10%
Greater York	4,394	66.3%	2,354	65.8%	72.4%	68.2%
South Western	626	9.4%	524	14.6%	13.6%	12.5%
South Central	570	8.6%	322	9%	5.5%	7.7%
South Eastern	258	3.9%	0	0%	0.9%	1.6%
Total	6,632	100%	3,579	100%	100%	100%

Source: York County Planning Commission

¹ Based on BBPC information from 2008 Economic Development Plan

² Based on average of Percent of Total Acres, Percent of Most Desirable Acres, and Job Share

Exhibit 5-25: Market Allocation by Planning Region



Comparison of the build out of each Region’s most desirable parcels that are available and suitable for development with the market allocation offers insight into each Region’s potential to accommodate development over the next ten (10) years.

Northern Region

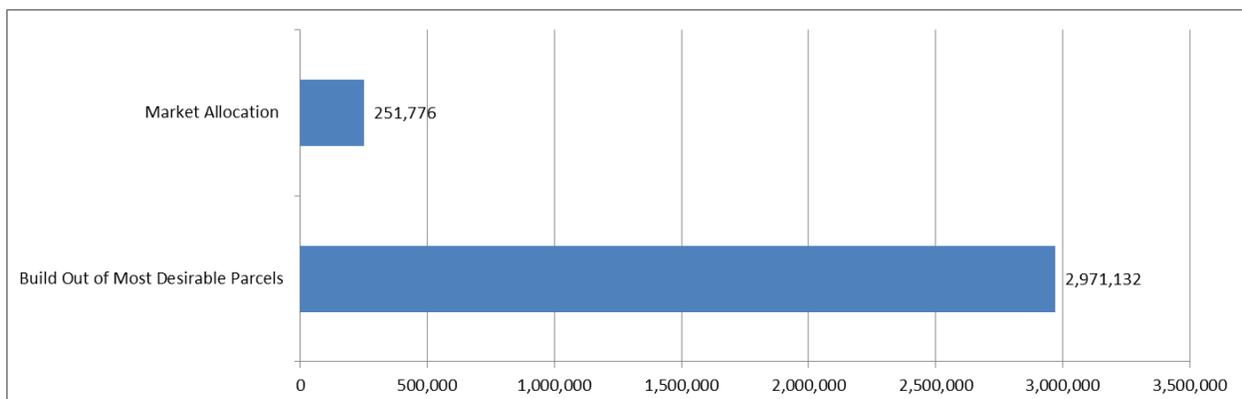
In the Northern Region, stakeholders have expressed desire for revitalization and infill in Boroughs, such as Dillsburg, which offer a large area targeted for mixed-use redevelopment, and for light industrial, office and retail growth along corridors. Many sites are available and suitable for development along I-83, US Route 15, and other major arterials. Overall, the Northern Region is positioned to increase its existing share of office, retail and industrial jobs in the County and could attract 10% of the office, retail and industrial development in the County over the next ten (10) years.

Stakeholders in the Northern Region have also expressed an interest in managed growth and development; conservation of natural resources and scenic areas; and neighborhood-serving, smaller scale retail expansion that addresses the daily needs of residents. This is discussed further in Chapter II, Vision Statement. Exhibit 5-26 provides a summary of land and market conditions in the Northern Region. A comparison of the market allocation with the build out of most desirable parcels for development is presented in Exhibit 5-27.

Exhibit 5-26: Northern Region Land & Market Summary	
Acres	784
Most Desirable Acres	379
Most Desirable Square Feet	16,506,290
Build Out of Most Desirable Parcels in Square Feet	2,971,132
Vacant Industrial, Office and Retail Square Feet	29,650,895
Market Share	10%
Market Allocation in Square Feet	251,776

Source: York County Planning Commission

Exhibit 5-27: Northern Region: Build Out of Most Desirable Available/Suitable Land and Market Demand for Economic Development of Square Feet



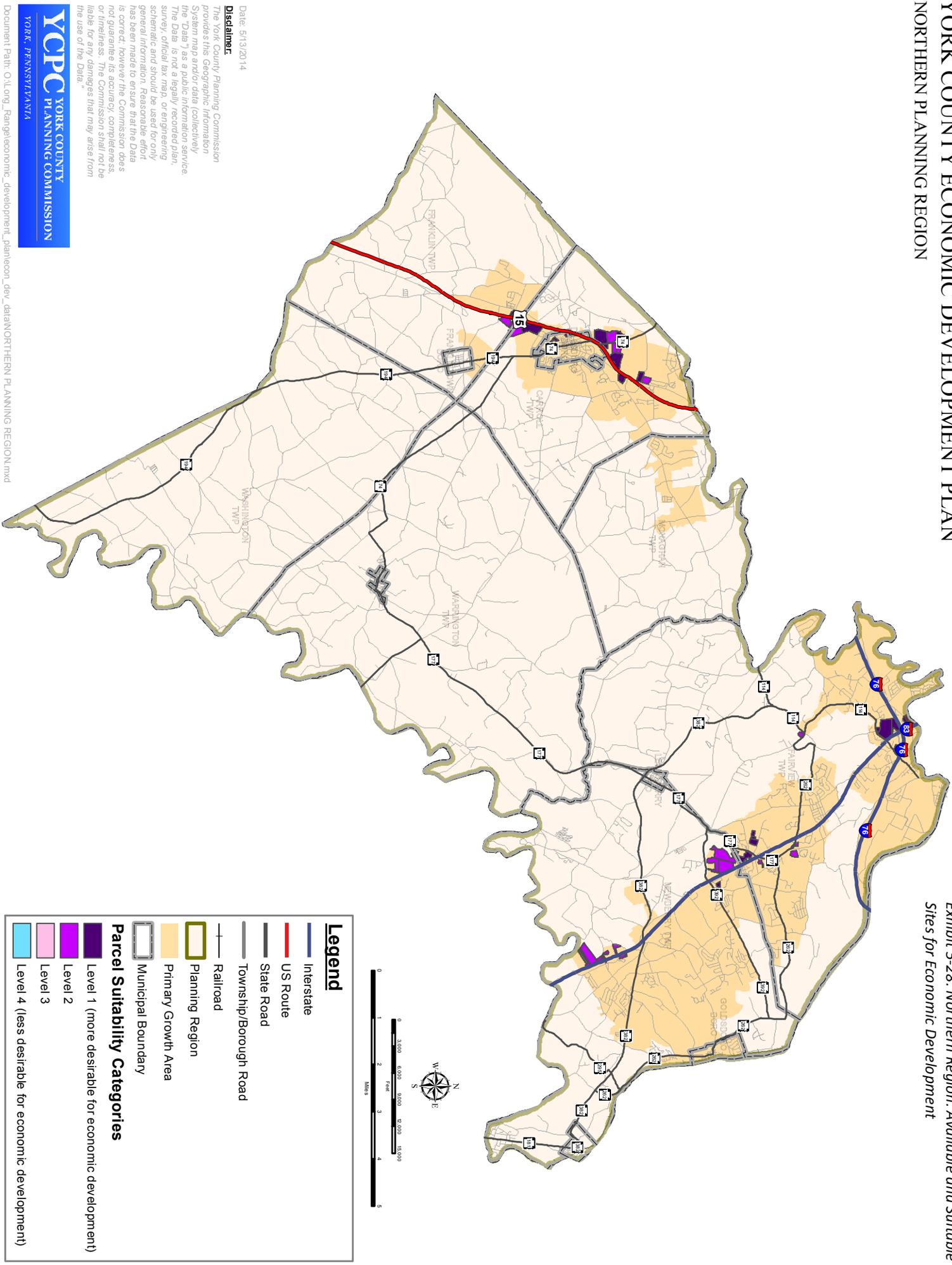
The Northern Region offers capacity to accommodate development which greatly exceeds the market demand for such development. With its desirable sites and transportation access, the Region offers good potential to realize its vision for economic development.

As depicted in Exhibit 5-28, the Northern Region contained 42 parcels meeting at least one (1) of three (3) criteria related to suitability for economic development (i.e. good access to transportation, within an Established Primary Growth Area, and having water and sewer generally available for development). These parcels ranged in size from three (3) to 85 acres, with a mean parcel size of 18.5 acres. There were ten (10) larger sites equal to or greater than 25 acres which were located in Carroll, Newberry, Franklin, and Fairview Townships. These included sites along major arterial highways, such as US 15 and I-83.

With 2.9 million square feet of land available/suitable and highly desirable for growth, a challenge for this Region (as well as other Regions) will be managing and targeting growth to areas desired for redevelopment and infill.

YORK COUNTY ECONOMIC DEVELOPMENT PLAN NORTHERN PLANNING REGION

Exhibit 5-28: Northern Region: Available and Suitable Sites for Economic Development



Date: 5/13/2014

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Greater York Region

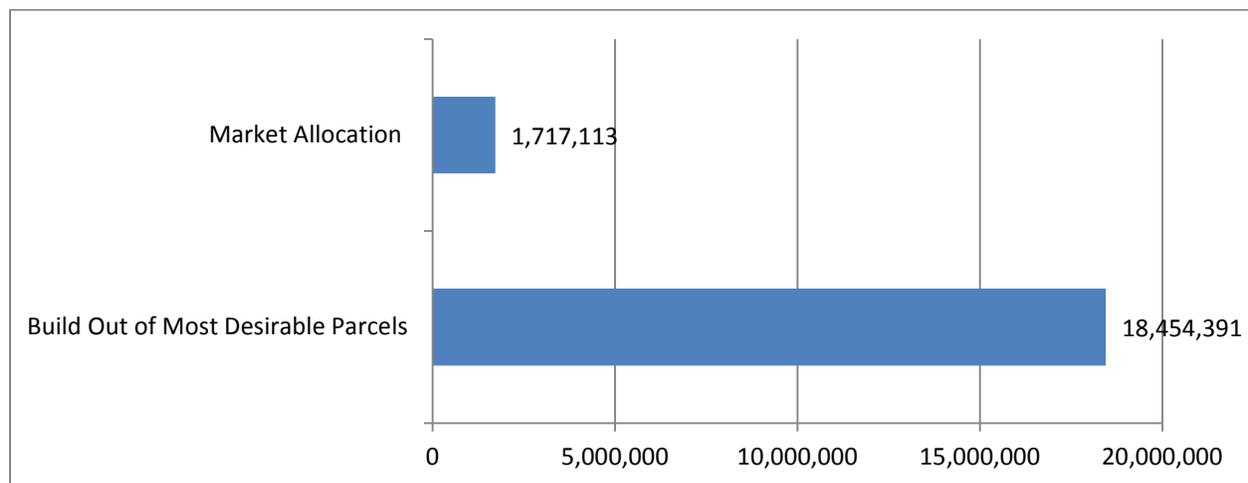
As the County’s hub for office, retail and industrial employment, the Greater York Region will likely continue to serve as the predominate Region for growth. The vision for this Region is consistent with its continued role as a hub for development in Established Growth Areas, and includes revitalization and infill for the City, Boroughs, and Townships with underused buildings; small business retention and expansion where infrastructure supports growth; neighborhood-serving smaller scale retail expansion that addresses the daily needs of residents; and managed growth and development.

A summary of land and market conditions in the Northern Region is provided in Exhibit 5-29. This is followed by a bar graph that compares the market allocation to the build out of the most desirable parcels for development (Exhibit 5-30).

Exhibit 5-29: Greater York Region Land & Market Summary	
Acres	4,394
Most Desirable Acres	2,354
Most Desirable Square Feet	102,524,396
Build Out of Most Desirable Parcels in Square Feet	18,454,391
Vacant Industrial, Office and Retail Square Feet	103,479,692
Market Share	68.2%
Market Allocation in Square Feet	1,717,113

Source: York County Planning Commission

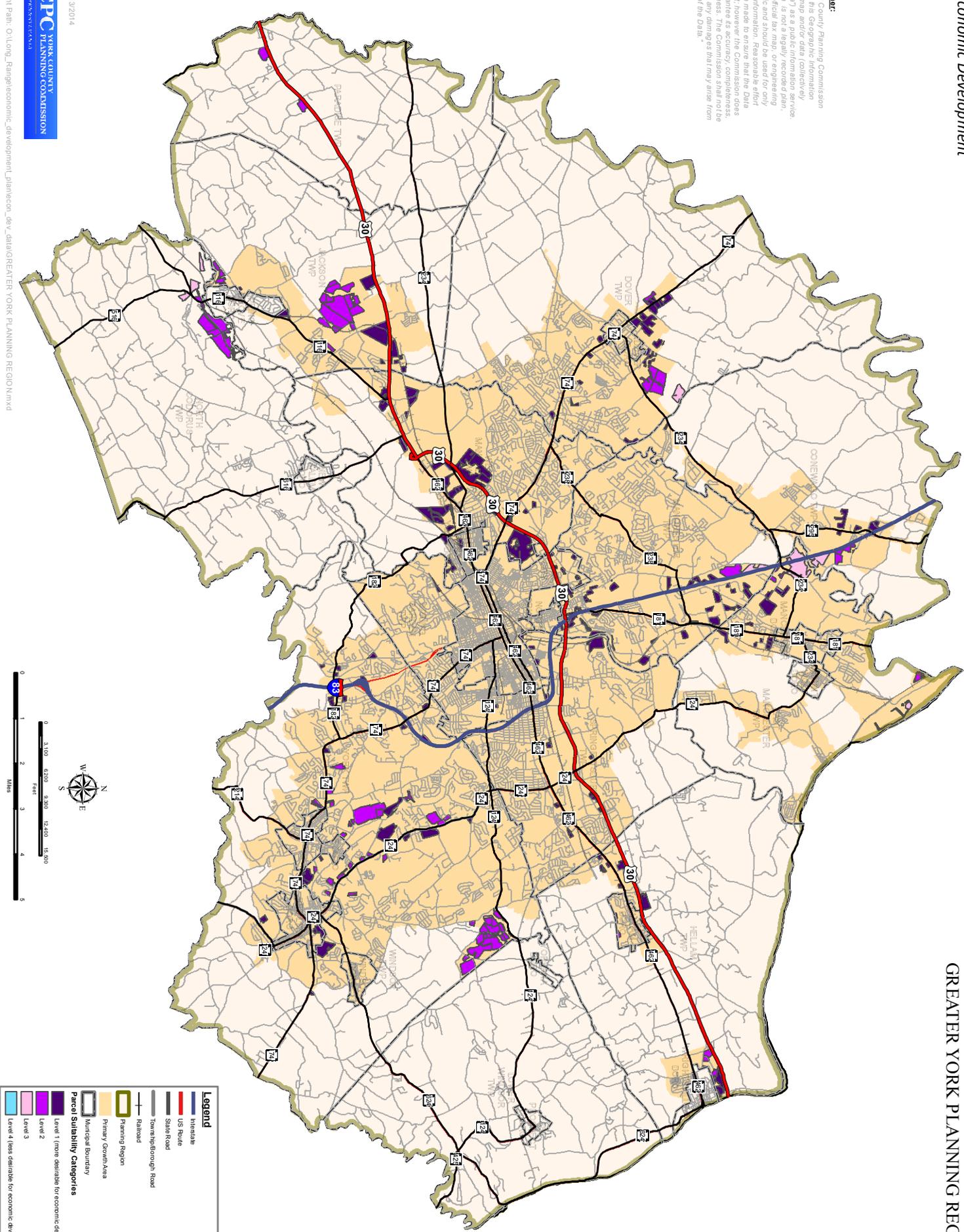
Exhibit 5-30: Greater York Region: Build Out Most Desirable Available/Suitable Land and Market Demand for Economic Development in Square Feet



The Greater York Region has approximately 10.5 times more highly desirable available/suitable sites for development than market demand to support such development, putting it in a strong position to accommodate demand over the next ten (10) years. In all, there were 257 parcels in the Greater York Region meeting at least one (1) of the criteria pertaining to suitability for economic development (illustrated in Exhibit 5-31). The parcels featured a mean size of 17 acres and ranged in size from three (3) to 165 acres. Of these parcels, there were 43 larger than or equal to 25 acres, many of which were located in Conewago, Dover, East Manchester, Hellam, Jackson, Manchester, North Codorus, Paradise, Springettsbury, West Manchester, Windsor, and York Townships. Many of these parcels were located along US 30 or I-83.

The Greater York Region has the most overall acreage available and suitable for development of any Region (18.4 million square feet). It offers many choices for developers. A challenge for this Region will be managing growth in order to focus development to targeted areas for reuse and infill.

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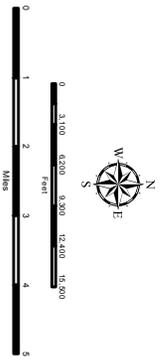


Legend

- Interstate
- US Route
- State Road
- Township Borough Road
- Railroad
- Planning Region
- Primary Growth Area
- Municipal Boundary

Parcel Suitability Categories

- Level 1 (more desirable for economic development)
- Level 2
- Level 3
- Level 4 (less desirable for economic development)



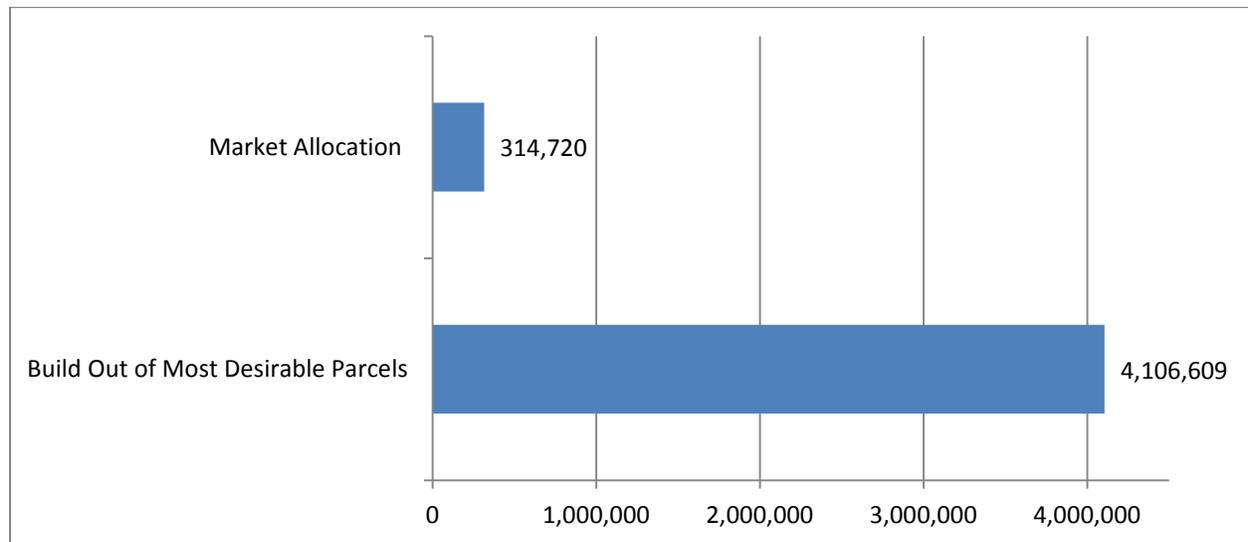
South Western Region

The South Western Region offers potential to maintain its share of growth. Its vision is for small business retention and expansion where infrastructure supports growth, managed growth and development, and revitalization and infill development or redevelopment. A summary of land and market conditions for the region is presented in Exhibit 5-32, while Exhibit 5-35 shows a comparison of the market allocation to the development of the most desirable parcels for development.

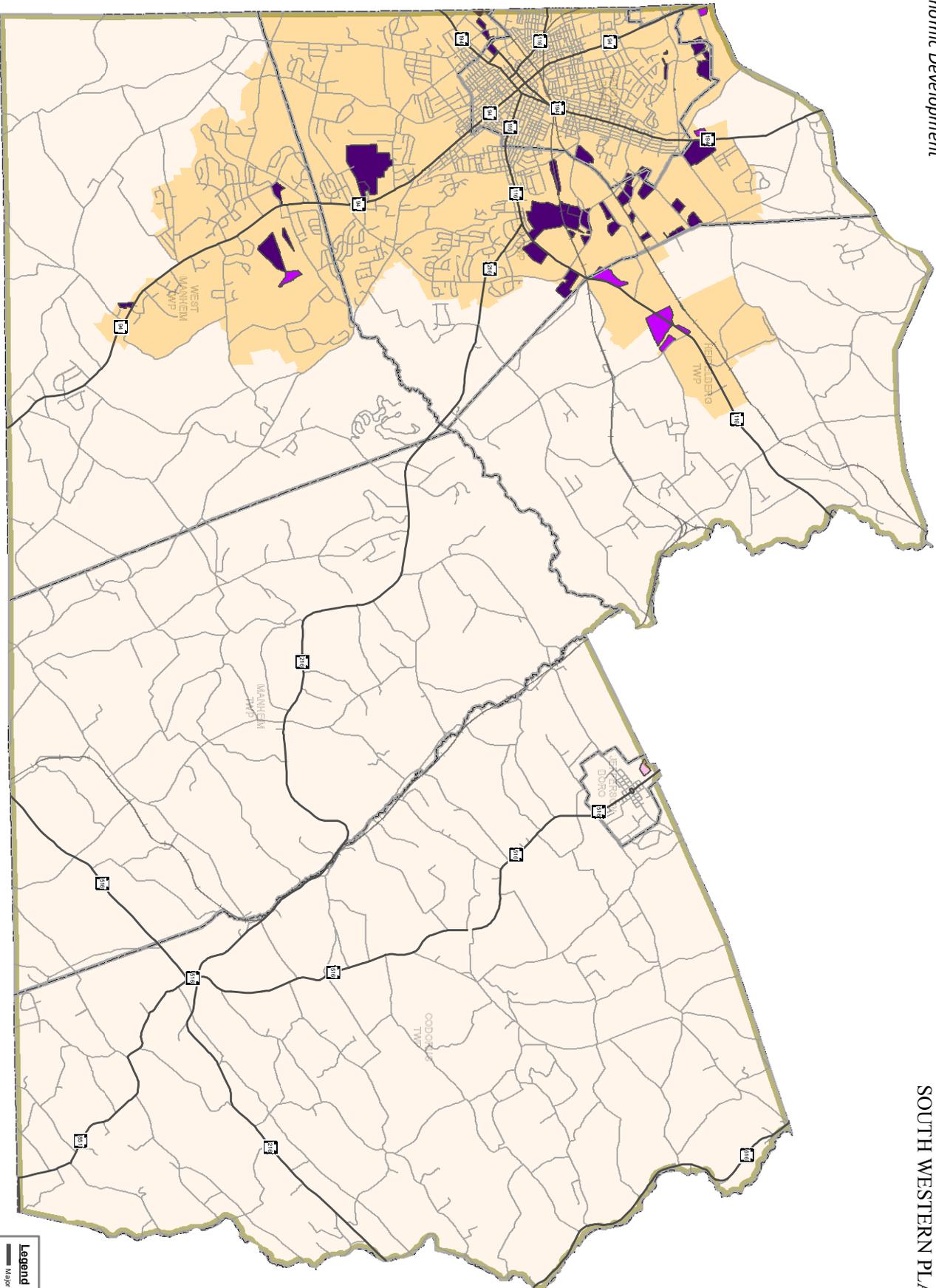
Exhibit 5-32: South Western Regional Land & Market Summary	
Acres	626
Most Desirable Acres	524
Most Desirable Square Feet	22,814,493
Build Out of Most Desirable Parcels in Square Feet	4,106,609
Vacant Industrial, Office and Retail Square Feet	20,376,549
Market Share	12.5%
Market Allocation in Square Feet	314,720

Source: York County Planning Commission

Exhibit 5-33: South Western Region: Build Out of Most Desirable Available/Suitable Land and Market Demand for Economic Development in Square Feet

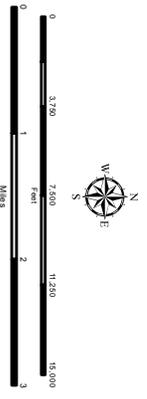


The South Western Region offers more than enough parcels that are both available/suitable for development and highly desirable for development. As shown in Exhibit 5-34, a total of 42 parcels meeting at least one (1) of the criteria related to suitability for economic development were located in the Region. These included sites ranging in size from three (3) to 103 acres, with a mean parcel size of 15 acres. Five (5) of these parcels were larger than or equal to 25 acres; all of these larger sites were located in Penn, Heidelberg, and West Manheim Townships, primarily along State Route (SR) 116 and along the rail line leading into Hanover Borough. The South Western Region should be able to more than adequately provide for projected development.



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Legend

- Major Road
- Township/Borough Road
- Railroad
- Planning Region
- Primary Growth Area
- Municipal Boundary

Parcel Suitability Categories

- Level 1 (more desirable for economic development)
- Level 2
- Level 3
- Level 4 (less desirable for economic development)

South Central Region

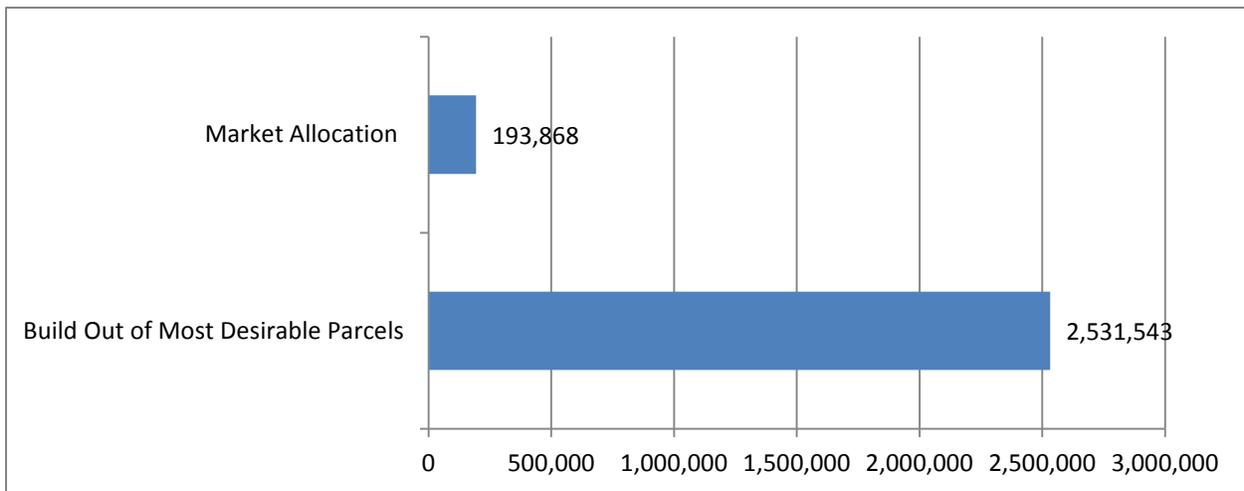
The South Central Region is likely to maintain its share of growth. While growth is occurring rapidly, it is largely constrained to the I-83 corridor. The vision for such growth is for small business retention and expansion where infrastructure supports growth, neighborhood-serving smaller scale retail expansion that addresses the daily needs of residents, and revitalization and infill development or redevelopment.

The land and market summary of the Region is presented in Exhibit 5-35. A comparison of the market allocation to the build out of the most desirable parcels for development is then presented in Exhibit 5-36.

Exhibit 5-35: South Central Region Land & Market Summary	
Acres	570
Most Desirable Acres	323
Most Desirable Square Feet	14,064,129
Build Out of Most Desirable Parcels in Square Feet	2,531,543
Vacant Industrial, Office and Retail Square Feet	18,060,346
Market Share	7.7%
Market Allocation in Square Feet	193,868

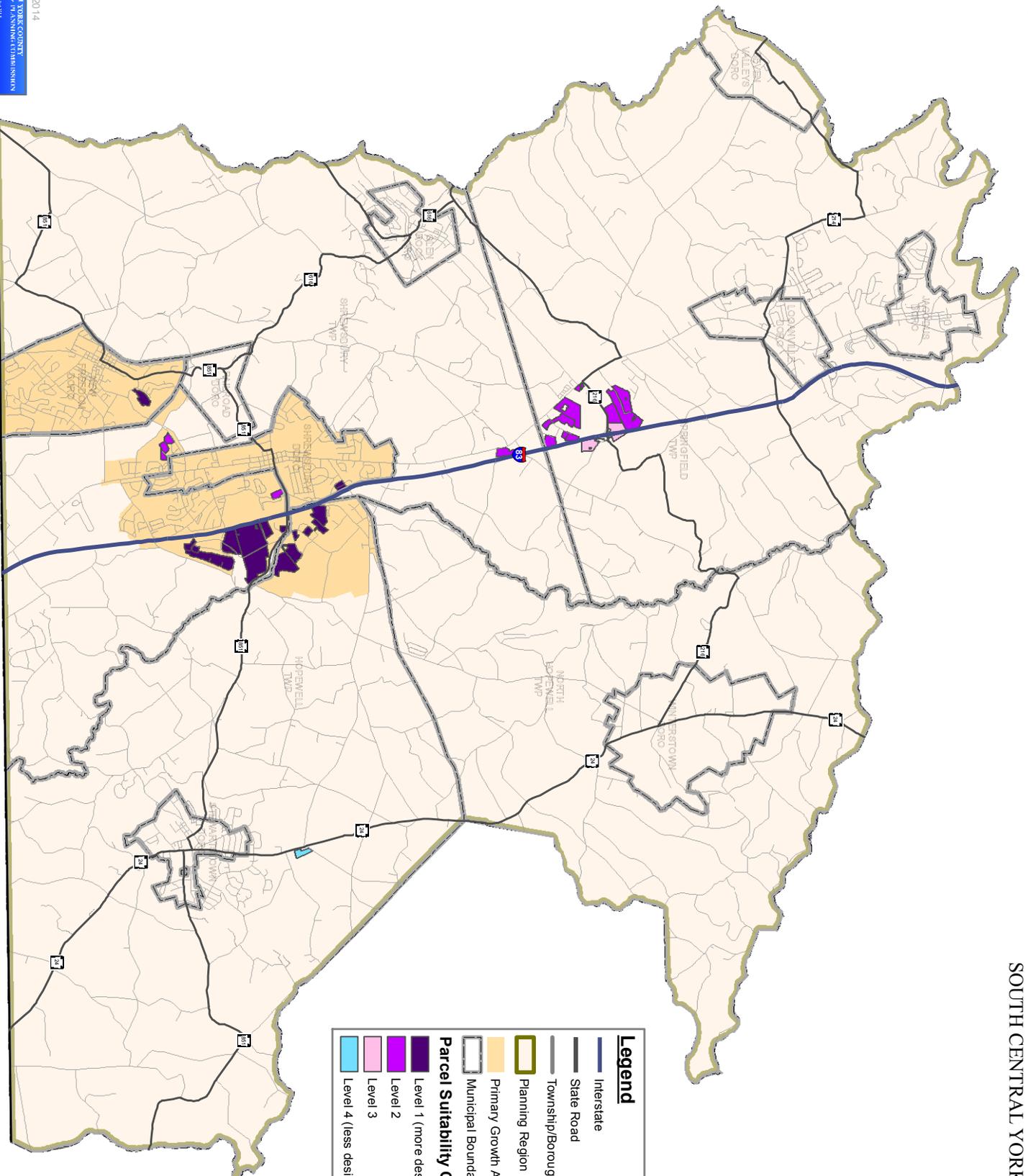
Source: York County Planning Commission

Exhibit 5-36: South Central Region: Build Out of Most Desirable Available/Suitable Land and Market Demand for Economic Development in Square Feet



The South Central Region features more than enough land supply of available/suitable and highly desirable sites to accommodate the development supported by the market. There were 33 parcels in the South Central Region that met at least one (1) of the criteria pertaining to suitability for economic development, as depicted in Exhibit 5-37. These ranged in size from three (3) to 76 acres, with a mean size of 17 acres. Six (6) parcels of 25 acres or greater were located near I-83 in Hopewell, Shrewsbury, and Springfield Townships. Given the amount of desirable acreage, a challenge for this area will be focusing development to existing industrial and business parks and the I-83 corridor.

YORK COUNTY ECONOMIC DEVELOPMENT PLAN
SOUTH CENTRAL YORK PLANNING REGION

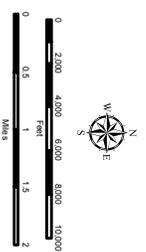


Legend

- Interstate
- State Road
- Township/Borough Road
- Planning Region
- Primary Growth Area
- Municipal Boundary

Parcel Suitability Categories

- Level 1 (more desirable for economic development)
- Level 2
- Level 3
- Level 4 (less desirable for economic development)



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South Eastern Region

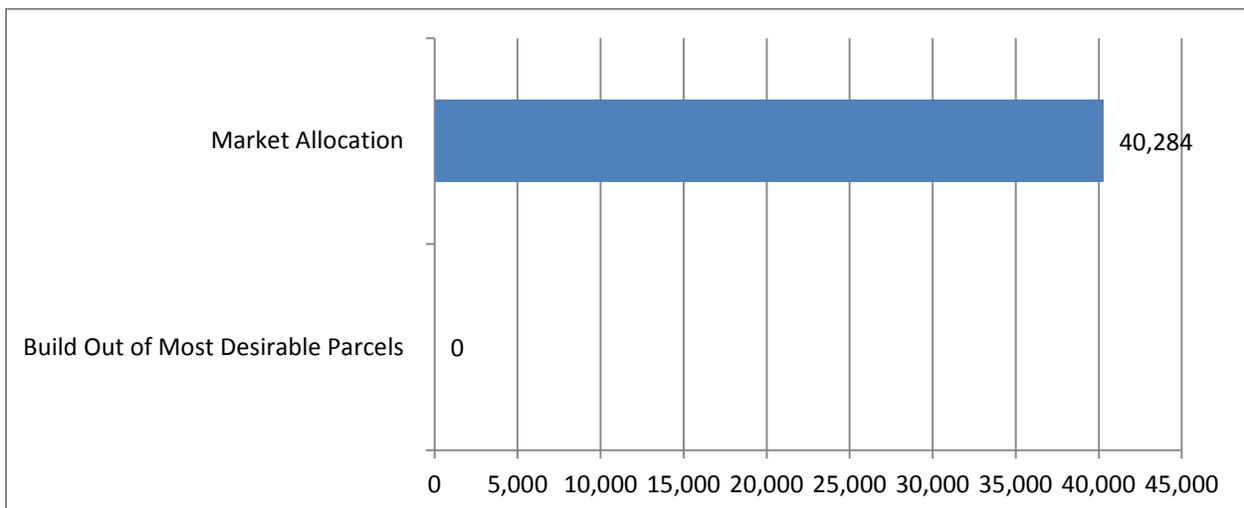
The South Eastern Region will likely continue to attract a relatively small share of overall County office, retail and industrial growth, due to limited opportunities for such development. The primary economic opportunities in this Region instead will be those related to agriculture, including traditional farms, as well as agritourism and agriculturally-related support businesses. This is in keeping with the vision for economic development in this Region. Small scale retail and office services, such as small neighborhood-serving retail shops and small medical offices, are also a strong fit for the Region given its vision and potential future share of Countywide demand for economic development.

Exhibit 5-38 provides a summary of land and market conditions in the South Eastern Region. Exhibit 5-39 shows a comparison of the market allocation to the build out of the most desirable parcels for development despite the fact that there were no parcels in the Region determined to be “most desirable”.

Exhibit 5-38: South Eastern Region Land & Market Summary	
Acres	258
Most Desirable Acres	0
Most Desirable Square Feet	0
Build Out of Most Desirable Parcels in Square Feet	0
Vacant Industrial, Office and Retail Square Feet	6,207,411
Market Share	1.6%
Market Allocation in Square Feet	40,284

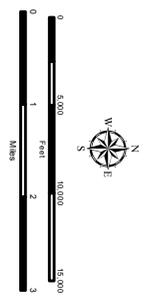
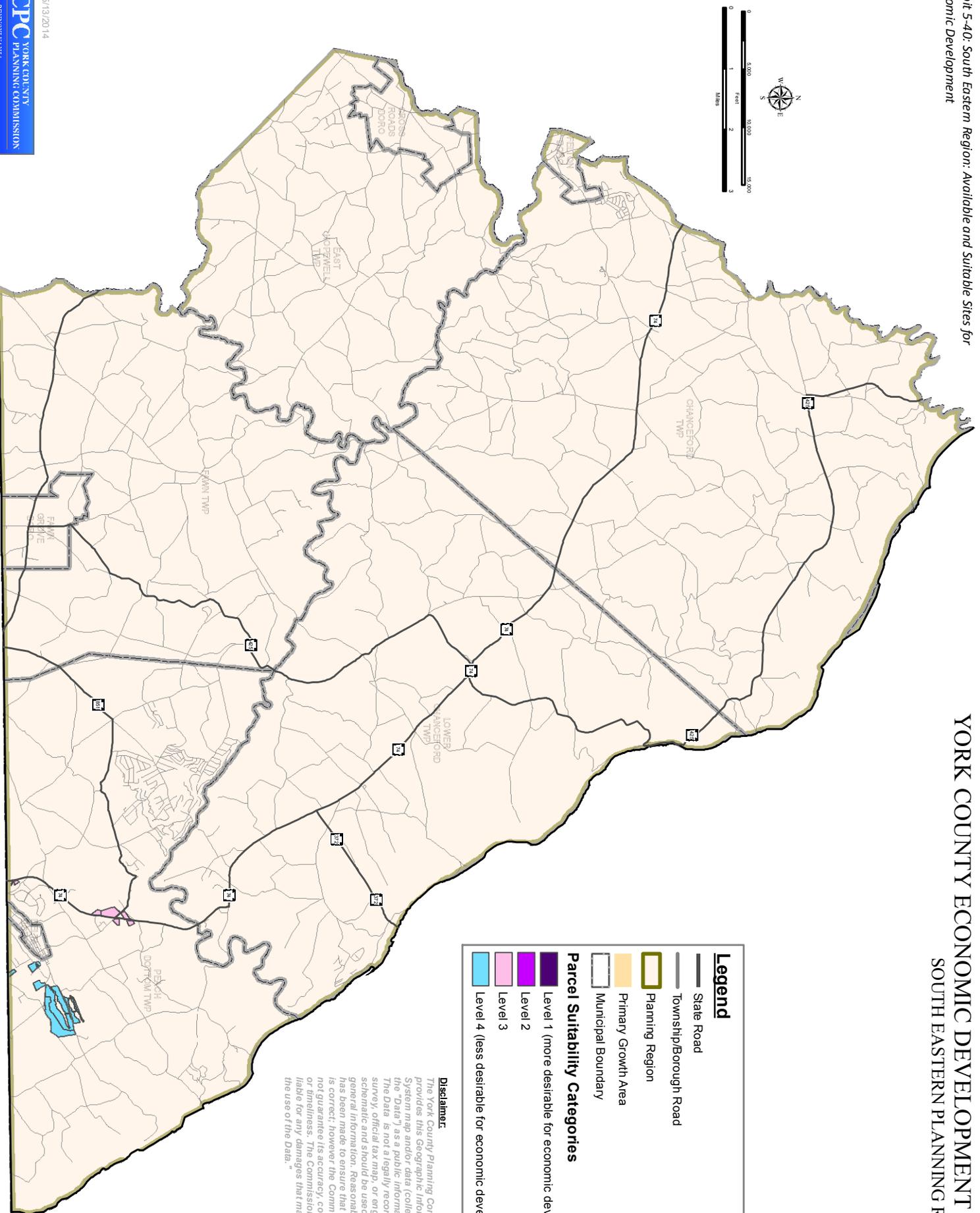
Source: York County Planning Commission

Exhibit 5-39: South Eastern Region: Build Out of Most Desirable Available/Suitable Land and Market Demand for Economic Development in Square Feet



Unlike other Regions in the County, the South Eastern Region contains no sites deemed highly desirable for development because the Region does not contain any Established Primary Growth Areas. However, the Region does offer six (6) parcels representing approximately 51 acres that are available and suitable for economic development, as well as located within one (1) mile of an uncongested transportation corridor. These sites offer potential to accommodate neighborhood-oriented retail and office services emphasized in the Region's vision for economic development.

In the South Eastern Region, there were 13 parcels meeting at least one (1) criteria related to suitability for economic development, as illustrated in Exhibit 5-40. The parcels ranged in size from three (3) to 92 acres, with a mean parcel size of 20 acres. Two (2) of these sites were equal to or larger than 25 acres. All of the 13 sites were located in Peach Bottom Township, including large sites along State Route (SR) 74.



Legend

- State Road
- Township/Borough Road
- Planning Region
- Primary Growth Area
- Municipal Boundary

Parcel Suitability Categories

- Level 1 (more desirable for economic development)
- Level 2
- Level 3
- Level 4 (less desirable for economic development)

Disclaimer:
The York County Planning Commission provides this Geographic Information System map and/or data (collectively the "Data") as a public information service. The Data is not a legally recorded plan, survey, official tax map, or engineering schematic and should be used for only general information. Reasonable effort has been made to ensure that the Data is correct, however, the Commission does not guarantee its accuracy, completeness, or timeliness. The Commission shall not be liable for any damages that may arise from the use of the Data."

School Districts

Within each of York County's school districts, there are some available and suitable sites for office, retail and industrial development to aid in balancing the tax base. However, in southern areas of the County – particularly the South Eastern Region, including areas within the Red Lion and South Eastern School Districts – there are very few available/suitable sites for office, retail and industrial development. This could present an issue if residential development in these areas is not balanced with non-residential growth. However, stakeholders in some municipalities, and to a large extent in the South Eastern Region, have voiced a strong desire to limit residential growth and to expand the viability of agricultural enterprises in order to prevent such unbalanced development.

There is a movement underway in Pennsylvania to change the school funding formula to add income taxes and potential sales taxes as sources of funds, while decreasing the reliance on property taxes for school funding. However, such changes to the law may not occur in the near term or even in the timeframe of this Plan. Stakeholders have expressed interest in strategies to allow joint comprehensive planning for school districts, such that districts with rapid residential growth might partner with areas experiencing industrial, office and retail development. Potential partners, as identified by stakeholders, include Red Lion and Dallastown School Districts and South Eastern and Southern School Districts. York County has suggested that the County pool its business tax revenues to allow for distribution to School Districts from a County-level standpoint.

5.7 Summary

York County is in a position to support office, retail and industrial development over the next ten (10) years, even though the next few years could continue to be a period of slower growth given the broader national recession. Based on the projections, there needs to be a focus on maintaining and promoting industrial development throughout the County. An additional challenge will be directing new office, retail, and industrial growth to existing development areas to both support and enhance those areas. This includes focusing on infill and redevelopment and updating infrastructure to not only maintain, but also make those areas attractive for new development.

Chapter VI

Critical Issues for Competitiveness Assessment

6.1 Overview

York County offers many assets that position it for economic growth. At the same time, the County faces a number of issues it must contend with in order to attract the types of growth envisioned. These issues and potential methods for addressing them are discussed below.

6.2 Workforce Development

York County faces three (3) broad workforce development issues. These issues include 1) aging of the population, 2) need for a diverse and educated workforce, and 3) need to enhance and market quality of life in the County to attract and retain a skilled workforce through the growth of the “Creativity Unleashed” initiative.

Issue 1: The population is aging, and young people are leaving, creating a need to recruit younger workers to replace retiring employees.

York County’s residents in prime working years are dwindling as more of the population enters retirement age.

Young workers, which will be of critical need to employers as many members of the existing workforce reach retirement age over the next ten (10) years, are decreasing in number. The proportion of workers of prime working age (e.g. 20 to 54), could fall from 48% to 45% by 2018. At the same time, the population of retirees and seniors is expected to increase, from roughly 27% to 32%.

These trends indicate that the County is losing its young workers, which will be needed to work in the innovative and creative fields of science and technology that are emerging across the nation and in York County. The loss of educated young workers could reduce York County’s competitiveness to attract knowledge-oriented firms and industries.

There is a need to attract and retain young workers.

This issue presents a need to further cultivate a high quality of life in York County, and to broaden the supply of amenities. Efforts to revitalize downtowns, instill agritourism and other agricultural diversions, to attract lively retail and restaurant offerings, and to provide high-quality mixed-use living and working environments will go far to strengthen York County’s pull to these young workers. The growth of the “Creativity Unleashed” campaign is critical in the branding efforts of York County. This initiative focuses on quality of place and presents the County as a prime region to build your career and your home. This is discussed further in Chapter IX.

Issue 2: York County’s potential to attract a diversified set of industries depends on the cultivation of a well-trained, high-quality and diverse workforce.

Industries with high growth potential all require scientific and technical skills.

Analysis of target industries in York County suggests that scientific and technology-oriented fields, including renewable energy, bio-medical, and health care, will have strong opportunities for expansion over the next ten (10) years. These industries are more resilient to recession than other industries. The growth of these industries presents an enhanced need for young workers with strong science and math skills. Thus, York County will have to focus on improving the aptitude of high school students in these critical fields.

There is a need to focus on expanding trades and science and technology training.

Altogether, the opportunities of these high-growth industries present a need for enhanced attention on expanding trades and technology training to be oriented to these fields. Such training would include skills training to fill gaps in manufacturing, which comprises much of York County’s existing employment base. In particular, there is a need to increase the labor force’s readiness for positions that are not on the production lines (e.g. engineers, toolmakers) and that should be in increasing demand over the next ten (10) years. There is also a major need to expand the pool of nurses in order to attract and expand the health care industry.

Issue 3: Recruitment of a highly-skilled and creative workforce will require an enhanced image and appeal throughout York County.

Highly educated and creative workers choose regions with high quality of life.

Households and creative workers that move to York County seek vibrant downtowns, scenic and recreational areas, and areas with unique character. This is positively impacted by York County’s “Creativity Unleashed” initiative.

There is a need to highlight and enhance York County’s amenities.

York County offers many desirable qualities, including charming historic towns and scenic agricultural and recreational areas, which function as amenity infrastructure that should be promoted and preserved. The revitalization of the County’s historic downtowns and small towns, including attraction and expansion of unique shops and restaurants, will help to attract a skilled workforce and a young workforce, as will the expansion of recreational attractions and agritourism (including wineries, bed and breakfasts, and farmers markets).

6.3 Availability and Suitability of Sites

With respect to land for office, retail and industrial expansion, York County has adequate space to grow, but still faces several challenges related to growth management. These issues include: 1) balancing residential growth with office, retail and industrial growth; 2) focusing growth into

downtowns, underused buildings and sites, and corridors rather than greenfield sites; and 3) targeting growth to areas served by infrastructure.

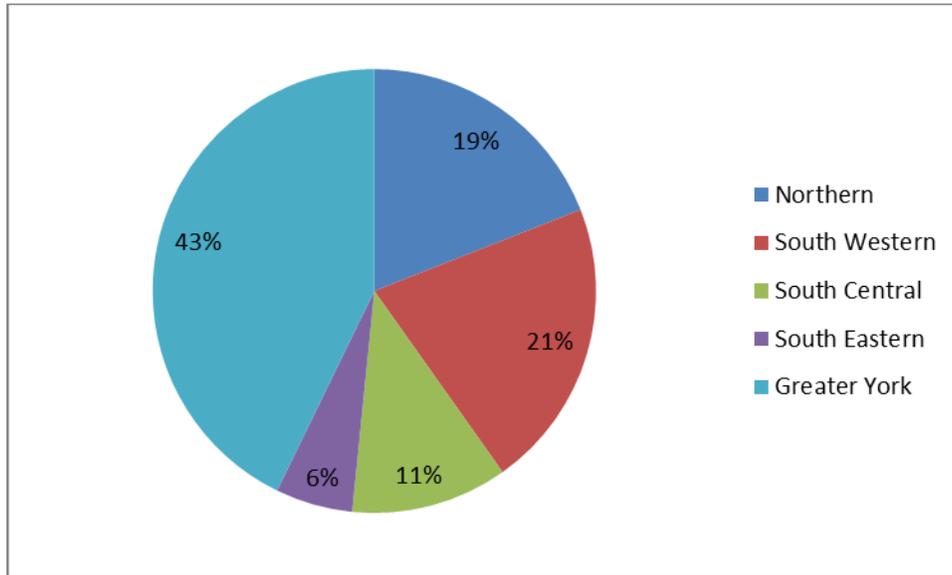
Issue 1: York County has experienced growth contrary to population declines in other parts of Pennsylvania, but residential development has dominated recent growth out of balance with office, retail and industrial development.

Residential development has outpaced office, retail and industrial development in recent years.

With its affordability and access to the broader mega-region that spans Philadelphia, Baltimore, and Washington, DC, York County has been a strong choice for new residents and residential development over the past several years. Such recent demand, coupled with relatively less rapid office, retail and industrial development, has led to an imbalance between residential development and office, retail and industrial development. Some municipalities have experienced more rapid residential growth than others, and some have experienced relatively higher levels of residential growth than office, retail and industrial, leading to growth disparities across municipalities.

Residential development, without a mix of office, retail and industrial development to offset the tax burden created from residential growth, can put pressure on a municipality's fiscal health. It can also strain local school systems and health care facilities. At the same time however, new residents can also expand the labor pool and add disposable income to an area, thereby making the area more attractive for employers and retail and service establishments. As shown in Exhibits 6-1, 6-2, 6-3, and 6-4, the amount of residential permits issued in 2012 for new development greatly exceeds the amount of commercial and industrial permits issued during that year.

Exhibit 6-1: Residential New Building Permits – 2012



Source: York County Planning Commission

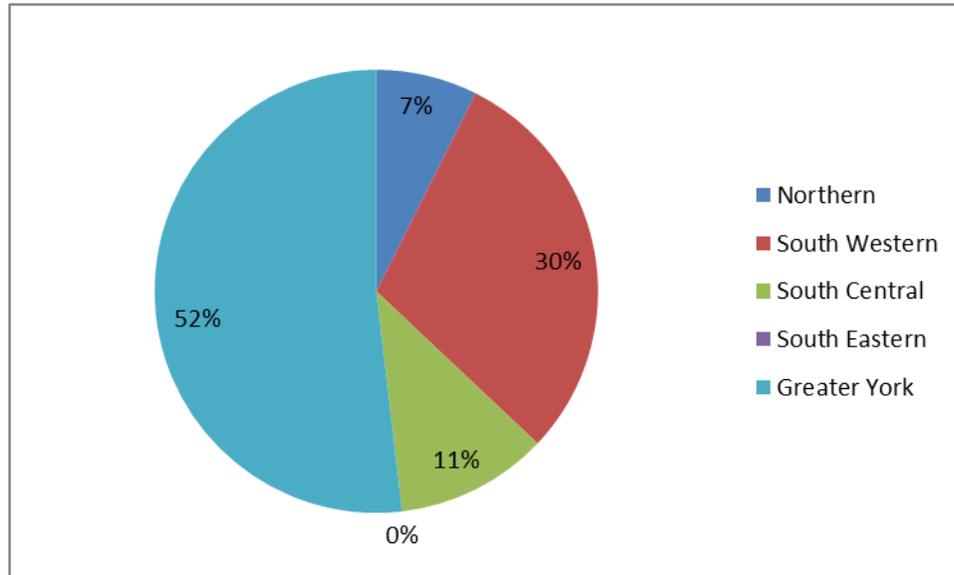
Exhibit 6-2: 2012 Residential New Building Permits (Units) York County Regional Distribution		
Northern	125	19%
South Western	139	21%
South Central	75	11%
South Eastern	37	6%
Greater York	281	43%
Total	657	100%

Source: York County Planning Commission

Exhibit 6-3: Commercial, Industrial, & Public Space New Building Permits (Units) York County Regional Distribution		
Northern	2	7%
South Western	8	30%
South Central	3	11%
South Eastern	0	0%
Greater York	14	52%
Total	27	100%

Source: York County Planning Commission

Exhibit 6-4: Commercial, Industrial, & Public Space New Building Permits (Units) York County Regional Distribution



Source: York County Planning Commission

There is a need to manage growth and to consider innovative growth management techniques to address imbalances.

The mismatch between residential growth and commercial, public space, and industrial growth presents a need to enhance commercial, public space, and industrial growth and to manage residential development in order to achieve a stronger balance between households and jobs. Planning experts recommend a jobs-to-housing balance of 1.3-1.7:1 (for every household, it is recommended that a community offer 1.3 to 1.7 jobs) for healthy and sustainable communities. In 2013, the Department of Labor indicated a job count of 172,170 with a census count of 168,128 households making the jobs-to-housing balance 1.02:1.

Regional planning presents one (1) avenue to address the impacts of imbalanced growth across municipalities. Adoption of a Multi-Municipal Comprehensive Plan, pursuant to an Intergovernmental Cooperative Planning Agreement, affords the participating municipalities the opportunity to share land uses. If the participating municipalities subsequently enter into an Intergovernmental Cooperative Implementation Agreement, they may also share tax revenues and fees, as well as adopt a transfer of development rights program whereby development rights can be transferred from one municipality in the region to another municipality in the region covered by the Multi-Municipal Comprehensive Plan.

Issue 2: New growth is occurring in more rural areas, though urban and downtown revitalization, adaptive reuse, and corridor development is desired.

Greenfield sites are being developed in rural areas despite strong interest in agricultural preservation, and in revitalizing existing downtowns and focusing growth in existing industrial parks and along main transportation corridors.

There will be a need to continue to protect/preserve agriculture and steer growth away from rural areas over the next decade, as growth will likely continue to be fueled by industry expansion. Over the next ten (10) years, there should be strong opportunities to expand office, retail and industrial establishments in York County. York County would be better served if growth were focused on redevelopment opportunities, brownfields, and downtown revitalization.

There is a need to focus office, retail and industrial growth to areas targeted for reuse and to steer such growth away from rural areas.

Overall, the growth of new establishments will offer opportunities to focus office, retail and industrial development into targeted redevelopment areas, into buildings targeted for adaptive reuse, into downtowns, into brownfield sites, into existing industrial parks, and along major transportation corridors. Strategic redevelopment projects can improve the existing infrastructure to productive reuse while also increasing the tax base.

Issue 3: Growth should occur where infrastructure can support new development.

Infrastructure , including transportation and utilities, is an important criterion for most new and expanding businesses in selecting sites for expansion.

For many established manufacturers, the availability, reliability and cost (in terms of price and time travel) of local utility and transportation infrastructure is a major criterion in site selection decisions. In York County, stakeholders and community members have expressed a strong desire for new office, retail and industrial development to be focused first where infrastructure is readily available and has capacity to service new growth. They have indicated that while transportation corridors in the County are attractive for growth, the impacts of growth on capacity and levels of service are of concern.

There is a need to ensure that areas targeted for future growth offer sufficient capacity from an infrastructure standpoint.

The desire for growth to occur in areas already served by infrastructure presents a need to broadly assess the capacity of the existing transportation network and local utilities to take on new customers.

As part of the market and land assessment conducted in Chapter V to inform the York County Economic Development Plan, an assessment was conducted of sites' access to transportation facilities (i.e. access to an uncongested major arterial highway, defined as those with a volume/capacity ratio of less than one (1) in the County's Transportation Plan) and general availability of water and sewer service (i.e. no systemic constraints as identified through the subjective assistance of water and sewer providers). The assessment concluded that the County appears to have adequate infrastructure capacity to support the level of economic growth (i.e. office, retail and industrial) projected to occur over the next ten (10) years. However, if the market demand for space in the County exceeds the projections in the Plan and such sites are developed more rapidly than projected, the need to reassess infrastructure capacity for other sites could emerge. The development of such sites should therefore be tracked and monitored over time in order to anticipate potential need to re-evaluate infrastructure over time.

6.4 Economic Development and Marketing

Though York County already offers a strong economic development program, there are areas where enhancements may be needed. These include: 1) enhancing collaboration and coordination of organizations; and 2) offering more efficient approvals processes.

Issue 1: Numerous organizations and governments are involved in economic development, but there is a need for enhanced collaboration and communication.

With 72 municipalities involved in planning and economic development, York County presents a unique challenge and need for collaboration and communication.

The collaboration between YCPC and YCEA on the York County Economic Development Plan provides a starting point for the type of interaction needed throughout the County. The process in creating the Plan has revealed many individual municipal efforts in growth management and economic development planning, and there is a need to highlight such efforts.

There is a need for a champion and coordination at the County level to allow individual municipalities and organizations to learn from the successes of others. Enhanced cooperation, collaboration and communication would best leverage limited funds for economic development, in that joint programs may be pursued (for instance, joint marketing programs).

Issue 2: Economic development would be enhanced with more efficient governmental approvals processes that consolidate processes and create a single point of contact.

The timeliness and responsiveness of local governments to development can enhance an area's competitiveness to targeted industries.

York County has identified industry clusters to target for business recruitment, retention, and expansion. For many of the manufacturing industries York County has identified as targets, overall cost of doing business, including regulatory approval processes, is an important factor.

Multiple visits to code offices and long wait times are frustrating to developers and business owners, and lengthy approvals processes can create an anti-development climate. This issue is not limited to the local level, as developers have noted that State approvals are equally if not more cumbersome than municipal processes.

Overall, there is a need to identify techniques to make governmental approvals processes more efficient at the local and State levels in order to enhance the County's competitive position for economic growth. There may be opportunities to consolidate inspection and code enforcement processes, and to identify single municipal points of contact to assist business owners and developers through approval processes.

6.5 Summary

While York County offers many strengths that position it for economic growth, there are critical issues in the workforce, land/sites, and economic development arenas that require strategic action to enhance York County's competitiveness. It is imperative that these critical issues remain the focus of York County's economic development initiatives.

Chapter VII

Competitive Position 2013

7.1 Overview

Given York County’s vision for economic development, it is useful to review available programs and resources related to the types of economic development activities identified as desirable for expansion. Existing programs and resources include those related to the five (5) strategies: workforce development, growth areas, rural areas, downtown revitalization, and incentives and economic development. In 2009, the research included evaluations of similar communities’ economic development models. These communities included Frederick County, Maryland, Worcester County, Massachusetts, and Greenville County, South Carolina. This data remains relevant and is discussed in Section 7.7 of this Chapter.

7.2 Current County Level Economic Development Efforts

With its long-established planning and economic development organizations (i.e. YCPC and YCEA), York County offers many tools for economic development. Key programs and resources administered at the County level are provided in Exhibit 7-1a and contain information for the lead entities is provided in Exhibit 7-1b. While Exhibit 7-1a does not provide an exhaustive inventory of all possible County programs and resources related to economic development, it does highlight top tools and resources related to the five (5) key strategy areas (i.e. workforce development, growth areas, rural areas, downtown revitalization, and incentives and economic development). Programs and resources in which the County serves as a partner to local municipalities, as well as programs and resources offered by the South Central PA Region, the State, Non-Profits, and the private sector are discussed in subsequent sections of this Chapter (Exhibits 7-2 through 7-5b).

Exhibit 7-1a: Key Programs and Resources			
Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Office of Workforce Development (OWD)	Workforce Development	YCEA	Created in early 2008, the Office of Workforce Development within YCEA provides direct contact to companies to help address employers’ current and future workforce needs. OWD serves to build, coordinate and strengthen York County’s network of workforce service providers (such as York County Alliance for Learning, Manufacturers’ Association, York County CareerLink, etc.) and to identify long-term workforce development strategies.
Design Center Initiative	Workforce Development	YCEA	YCEA is working to attract a design-related workforce in the areas of architecture and engineering. As part of the initiative, YCEA developed a workforce recruitment website and marketing campaign, which launched in Fall/Winter 2009, with an emphasis on marketing York County to potential hires.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Creativity Unleashed	Workforce Development	YCEA	York County's branding efforts for the Industrial Art & Design Capital aimed at showcasing the Quality of Place for York County.
2 + 2 + 2	Workforce Development	YCEA	An OWD initiative focused on building a skilled workforce suited to the needs of the engineering community. This program builds on credits towards increased levels of advanced degrees gaining the student employability at each leg of the program.
Corridor Planning	Growth Areas	YCPC	YCPC works with municipalities on corridor planning studies, to analyze transportation issues such as capacity, safety and access to the study area roadways and determine cost-effective ways to address corridor transportation needs.
Access Management	Growth Areas	YCPC	YCPC prepares access management plans for corridors as part of transportation planning efforts. Access management involves analysis of roadway operations, design, planning and policy, and is meant to balance access for adjacent land uses with safety and efficiency.
Municipal Outreach Program	Growth Areas	YCEA	YCEA works with local municipalities to enhance awareness of how local activities impact economic development. YCEA speaks with local municipal officials and elected boards about the impact of local zoning, code enforcement and infrastructure improvements to economic development.
Build-Out Analysis, Population Projections, Census Information	Growth Areas; Rural Areas	YCPC	YCPC serves as a data resource, and performs build-out analysis of municipalities based on current zoning classifications, population projections, and U.S. Census data.
Technical Assistance	Growth Areas; Rural Areas	YCPC	YCPC assists local municipalities with grant applications, training and planning guidance.
Rural Area Delineation	Rural Areas	YCPC	As part of implementing the Growth Management Plan component of the York County Comprehensive Plan, YCPC worked cooperatively with municipalities to formally designate Established Rural Areas based on land uses, lack of infrastructure and services, and protection of natural and agricultural resources. Modifications to the research will be considered as the need arises.
Agricultural Funding	Rural Areas	YCEA/ SEDCO	YCEA serves as a local resource for farmers interested in information regarding low-interest loans for agricultural use. The Commonwealth's First Industries Fund, which offers low-interest loans for agriculture and tourism activities, may be accessed through a YCEA allied entity, the Small Enterprise Development Company (SEDCO). The loans are offered at up to \$200,000 or 50% of eligible project costs.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Agricultural Funding	Rural Areas	YCEA/ YCIDA	A YCEA staffed entity, the York County Industrial Development Authority, is a conduit for lower than conventional rate interest loans of up to \$500,000 through the Next Generation Farmer Loan Program. The loan program is for Federally qualifying first-time farmer projects.
Market District	Downtown Revitalization	Downtown Inc. /YCEA/ Better York	Urban branding initiative underway, which is a collaborative effort between the York County Economic Alliance, Downtown Inc., and Better York.
York County Heritage Program	Incentives & Economic Development	YCPC	The York County Heritage Program is administered by the York County Planning Commission, which officially designates locally authentic historic, cultural, and natural resources through an application process. Once designated, the resources, together with related information, are listed on the website.
Heritage Region	Incentives & Economic Development	Susquehanna Gateway Heritage Area	York County is part of the Susquehanna Gateway Heritage Area, one of 12 official State heritage regions, which allows for marketing of heritage tourism focused on promoting the preservation, conservation and interpretation of the Susquehanna River's cultural and natural heritage. The County is also part of the River Towns Heritage Development Strategy, an initiative focused on using the Susquehanna River as a defining economic and visitor attraction for communities nearby (i.e. Columbia, Wrightsville, Marietta, Washington Boro, Long Level and Accomac).
Investors Circle of York (ICY)	Incentives & Economic Development	ICY	Angel investors group which provides capital for start-up, expansion or acquisition activities, YCEA serves as the first point of contact for entrepreneurs interested in receiving ICY funds.
General Authority of South Central Pennsylvania (GASP)	Incentives & Economic Development	GASP	County entity which serves as a municipal financing authority that can issue bonds for eligible tax-exempt and taxable economic development and non-profit projects.
Partnership for Economic Development of York County (PEDYC)	Incentives & Economic Development	PEDYC	A 501(c)3 organization that serves to stimulate interest and to assist in the promotion of plans that promote the industrial and economic development of York County, in order to increase the flow of wages and income into the channels of trade and commerce. PEDYC projects include several economic and community development initiatives, such as fiscal sponsorship, county wide branding, and the Municipal Outreach Program.
Redevelopment Authority of York County (RACY)	Incentives & Economic Development	RACY	County entity focused on redeveloping and rehabilitating blighted industrial properties. Additionally, RACY serves as a conduit for project funding and as a tax increment financing (TIF) resource.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Small Enterprise Development Company (SEDCO)	Incentives & Economic Development	SEDCO	An entity which supports small businesses and administers through the Small Business First Fund (SBFF), which provides low-interest loans for land, buildings, equipment and working capital.
York County Bankers Consortium (YCBC)	Incentives & Economic Development	YCBC	County entity which allows small businesses to present applications to multiple banks simultaneously after first successfully completing a screening process. Approximately one (1) dozen lending institutions currently participate in the program.
York County Hospital Authority (YCHA)	Incentives & Economic Development	YCHA	County entity which finances public or non-profit hospitals and hospital facilities.
York County Industrial Development Authority (YCIDA)	Incentives & Economic Development	YCIDA	County entity which administers the Industrial Development Authority Bond Financing Program and the Pennsylvania Industrial Development Financing Authority Program, and which invests in industrial parks and job creation activities. Administration of the bond programs allows for lower-cost financing of eligible business needs, including land, buildings, machinery and equipment costs.
Business Outreach Program	Incentives & Economic Development	YCEA	YCEA conducts, through its Business Liaisons (interviewers), retention and expansion visits annually with businesses in target industry clusters. The two (2) way dialogue that results from these visits allows business leaders to better understand available County, State and Federal economic development resources, as well as offering YCEA the chance to understand the individual business' concerns and business trends. Interviews often result in referrals to YCEA staff or other service providers which can counsel businesses with respect to issues.
Business Attraction	Incentives & Economic Development	YCEA	YCEA provides assistance to firms regarding site selection and infrastructure, economic and demographic research, and in networking with local, regional, and State entities.
YCEA Marketing Plan	Incentives & Economic Development	YCEA	A portion of YCEA's marketing plan focuses on attracting businesses in target industry clusters, with guidance from the Comprehensive Economic Development Strategy (CEDS).
Administration of State Funding Programs	Incentives & Economic Development	YCEA	YCEA administers State loan, grant and tax credit/abatement programs available for capital development, environmental assessment and/or remediation, training and technical support.
Foreign Trade Zone (FTZ) 147	Incentives & Economic Development	Campbell Trade Group, Inc.	FTZ 147 is a regional economic development project that encompasses the counties of Adams, Berks, Dauphin, Cumberland, Franklin, Lancaster, Perry and York.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Foreign Direct Investments Efforts/International Trade	Incentives & Economic Development	YCEA	The YCEA attracts foreign direct investors through marketing efforts. These include collaborative marketing with regional partners, the State of PA and Select USA, participation in trade show activities and other events focused on attracting foreign direct investors.
Facilitate Joint Municipal Economic Development	Incentives & Economic Development	YCEA	YCEA dedicates full time staff to serve the economic development needs of The Borough of Hanover and Penn Township, located in the southwestern region of York County. Joint municipal goals include retaining and expanding Hanover's hearty industrial base, renewing Hanover's historic downtown, planning for economic development needs and partnering with community organizations for the benefit of the Hanover region. YCEA's Hanover office is located in the Hanover Area Chamber of Commerce building.
Impact Analysis	Incentives & Economic Development	YCEA	YCEA has conducted fiscal and economic impact analysis of catalytic investments, such as an impact analysis conducted prior to the investment in Sovereign Bank Stadium, and for business attraction, expansion and retention projects.
Entrepreneurial Support Alliance (ESA)	Incentives & Economic Development	ESA	The ESA serves as a one-stop shop for entrepreneurial development, and provides technical assistance through workshops on such topics as commercialization of products and referrals to service providers.
York County Keystone Innovation Zone (KIZ)	Incentives & Economic Development	KIZ	The York County KIZ, a geographically bound program, supports innovation and entrepreneurship by bringing together higher education institutions, private business, and State and local resources.
Growth Area Definition	Growth Areas	YCPC	As part of implementing the Growth Management Plan component of the York County Comprehensive Plan, YCPC worked cooperatively with municipalities to formally create Established Growth Areas, based on services, infrastructure, and land uses. Modifications will be considered as the need arises.
Codorus Corridor Strategy	Downtown Revitalization	YCEA	In 2006, YCEA released the "River of Opportunity" land use and economic plan for the Codorus Corridor. The Plan called for \$1 billion in redevelopment activity along the Codorus Corridor over a 20 year timeframe, including, but not limited to, projects in the Northwest Triangle, in the Keystone Innovation Zone, along the Broad Street Corridor, and others. The Plan also referenced the creation of an amenity along the riverfront with a linear park and walking/biking trails to support creative class development.
Municipal Consulting Program	Growth Areas; Rural Areas	YCPC	As part of County long range and municipal planning activities, YCPC participates in meetings, work groups, organizations and planning efforts to encourage local plans that are consistent with the York County Comprehensive Plan and the adoption of local ordinances to implement the plans.

Exhibit 7-1b: Contact Information for Key Programs and Resources

York County Economic Alliance	144 Roosevelt Avenue	York, PA 17401	717-848-4000
York County Planning Commission	28 E. Market Street, 3rd Floor	York, PA 17401	717-771-9870
Downtown Inc.	16 N. George Street	York, PA 17401	717-849-2331
Susquehanna Gateway Heritage Area	1706 Long Level Road	Wrightsville, PA 17368	717-252-0229
Campbell Trade Group	P.O. Box 3478	York, PA 17402	717-873-0569
York County Keystone Innovation Zone (KIZ)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
Entrepreneurial Support Alliance (ESA)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
Investors Circle of York (ICY)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
General Authority of South Central Pennsylvania (GASP)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
Partnership for Economic Development of York County (PEDYC)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
Redevelopment Authority of York County (RACY)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
Small Enterprise Development Company (SEDCO)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
York County Bankers Consortium (YCBC)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
York County Hospital Authority (YCHA)	144 Roosevelt Avenue	York, PA 17401	717-848-4000
York County Industrial Development Authority (YCIDA)	144 Roosevelt Avenue	York, PA 17401	717-848-4000

7.3 Current Local Economic Development Efforts

Local municipalities are also engaged in economic development activities to varying degrees. Some of York County’s municipalities have undertaken strategic planning and/or revitalization planning and implementation efforts to support local business development. While not all municipalities have engaged in such efforts, every municipality impacts economic development potential within its borders through its planning and zoning activities. The following table

provides a summary of top techniques through which local municipalities in York County participate in economic development. YCPC serves as a resource for many of these techniques.

Exhibit 7-2: Current Local Economic Development Programs and Resources			
Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Subdivision and Land Development Ordinance (SALDO)	Growth Areas	Local Municipalities	Local municipalities adopt subdivision and development rules, regulations and standards through the SALDO. The Municipal Planning Division within YCPC provides technical and review services to municipalities with an adopted SALDO. Municipalities without an adopted SALDO fall under the jurisdiction of the County SALDO.
Capital Improvements Plan (CIP)	Growth Areas	Local Municipalities	Local municipalities prepare capital improvements plans, which delineate planned capital expenditures for a five (5) or ten (10) year period, including identification of the prioritization of projects and financing/funding sources. YCPC encourages municipalities to integrate capital improvements planning with comprehensive planning to ensure the prioritization of projects implementing goals laid out in the comprehensive plan.
Impact Fees	Growth Areas	Local Municipalities	Municipalities have the authority to enact a Transportation Impact Fee Ordinance if the following plans and ordinances have also been adopted: Comprehensive Plan, Zoning Ordinance, and Subdivision and Land Development Ordinance. The Transportation Impact Fee Ordinance allows the municipality to assess impact fees on developments for transportation capital improvements off-site of the development prior to final approval of a subdivision or land development plan.
Joint Municipal Impact Fees	Growth Areas	Local Municipalities	When municipalities have adopted a Multi-Municipal Comprehensive Plan, they have authority to enact a Joint Municipal Impact Fee Ordinance to assess impact fees on developments for transportation capital improvements off-site of the development prior to final approval of a subdivision or land development plan. Such municipalities must also have a zoning ordinance and SALDO.
Incentive Zoning	Growth Areas	Local Municipalities	Municipalities in Pennsylvania may offer incentive zoning, under which developers are offered a higher density or intensity or reduced requirements (e.g. reduced parking and setback requirements, which reduces overall development cost) in exchange for the provision of amenities (e.g. parks, landscaping, plazas, streetscape improvements, or affordable housing). Incentive zoning is often provided through overlay provisions.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Official Map Ordinance	Growth Areas; Rural Areas	Local Municipalities	YCPC reviews Official Maps created by local municipalities as part of County long range planning. The Official Map is a land use ordinance prepared by local municipalities consisting of two (2) parts, text and a map, which identifies public and private lands for which the municipality has a current use or future need (e.g. for public facilities, streets, parkland, etc.).
Joint Municipal Comprehensive Planning	Growth Areas; Rural Areas	Local Municipalities	Municipalities in Pennsylvania have authority to prepare & adopt Multi-Municipal Comprehensive Plans, which include the components of an individual Comprehensive Plan (e.g. description of future growth, development, land use & community character). The primary benefit of multi-municipal planning is the potential for individual municipalities to avoid providing for every land use when those uses are provided in other participating municipalities & are sufficient to meet the needs of the region.
Open Space Development	Growth Areas; Rural Areas	Local Municipalities	Also known as conservation by design, open space development is implemented through the municipality's Zoning Ordinance and/or its Subdivision and Land Development Ordinance. Open space development is similar to cluster development but requires a higher percentage of the site to be dedicated to open space in order to preserve more land for conservation uses while still providing for full-density development. Conservation uses include farmland, woodland habitat, historic sites and scenic views.
Cluster Development	Growth Areas; Rural Areas	Local Municipalities	This alternative form of residential development allows a new residential development to reduce lot area, setback and other site regulations while providing common open space for no overall increase in density compared to a conventional subdivision. Municipalities may specify cluster development as a by-right option in the zoning ordinance or as a special exception or conditional use; the latter usually results in higher costs and lengthened review period.
Overlay Zoning	Growth Areas; Rural Areas	Local Municipalities	Municipalities may specify overlay zones in order to apply regulations to an area that trump the requirements of the underlying zoning district. Overlay zoning may be used for incentive zoning, transfer of development rights, scenic roads and districts, and protection of natural or historic resources, as well as along major thoroughfares and around intersections, interchanges and transportation facilities.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Agricultural Protection Zoning (APZ)	Rural Areas	Local Municipalities	<p>Municipalities are required by the Pennsylvania Municipalities Planning Code (MPC) to protect prime agricultural land (class 1-3 soils). Agricultural protection zoning (APZ) is a tool to protect prime agricultural land in rural areas (it is not applicable to designated growth areas) and includes several methods:</p> <p>1) Fixed System: allows one dwelling for a specified number of acres (i.e. one dwelling per 25 acres); 2) Sliding Scale System: varies the number of permitted dwelling units based on the acreage of the parent parcel (the formula is non-linear, resulting in larger parcels permitted to have proportionately less dwellings than smaller parcels); and 3) Percentage System: limits the percentage of land that may be subdivided.</p>
Transfer of Development Rights (TDR)	Rural Areas	Local Municipalities	<p>Municipalities have the authority to provide for the transfer of development rights (TDR) in their zoning ordinance. TDR permits the owner of a parcel of land in a designated sending area to transfer development rights to another parcel in a designated receiving area where development is more desirable (ex. from an agricultural zoned parcel to a residential, commercial or industrial zoned parcel). TDR across municipal boundaries is allowed in areas where a joint municipal zoning ordinance is in effect, a multi-municipal comprehensive plan has been adopted, or a written agreement has been adopted by the participating municipalities. TDR programs are most effective when development regulations in the receiving area allow the developer to obtain a higher return through purchasing development rights and developing land at either a higher density or increased intensity than permitted by the base regulations.</p>
Agricultural Security Areas (ASA)	Rural Areas	Local Municipalities	<p>Since 1981, Pennsylvania’s farmers have been empowered to initiate the process whereby local municipalities create Agricultural Security Areas, thereby offering special consideration to farmers against nuisance challenges. At least 250 acres must collectively be placed in the area to become an ASA. Multi-municipal agricultural security areas may be created. Location in an ASA is also required to be eligible for the County’s Conservation Easement Program.</p>

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Main Street Programs	Downtown Revitalization	Nonprofit Entities	Main Street is a comprehensive approach to downtown revitalization coined by the National Trust for Historic Preservation, and is based on the four (4) point approach: downtowns undertake activities in the areas of design, organization, promotion and economic restructuring to ensure comprehensive action is taken to revitalize the designated areas. In York County, Downtown Inc. administers York City's downtown Main Street program, and in Hanover, Main Street activities are performed by Main Street Hanover, an initiative of PEDYC.
Historic Preservation	Downtown Revitalization	Local Municipalities	Municipalities may adopt an Historic District Ordinance which defines the district's boundaries, creates an Historic Architectural Review Board (HARB) and provides design guidelines and criteria for decision-making. An alternative is to incorporate historic preservation provisions into the zoning ordinance and/or subdivision/land development ordinance and create an historic preservation committee.
Local Revitalization and Redevelopment Plans	Downtown Revitalization	Local Municipalities	Many York County municipalities have undertaken redevelopment and revitalization planning efforts to focus strategically on the types of uses, economic activities, and implementation actions desired in small areas. Efforts include those undertaken in Dillsburg, Red Lion, Stewartstown, and Wrightsville Boroughs, and in Springettsbury Township.
Local Economic Revitalization Tax Assistance (LERTA)	Incentives & Economic Development	Local Municipalities	This program allows for deferral of that portion of real estate taxes attributed to improvements (e.g. a new facility or major expansion) made by a new or expanding company in designated LERTA areas. Those real estate taxes are then phased in over a ten (10) year period by 10% annually. Designated LERTA districts include those in the City of York and the Townships of Conewago, East Manchester, Hopewell, Jackson and West Manchester.
Fresh Food Fund (FFF)	Incentives & Economic Development; Downtown Revitalization	York City	Based on a grant from the United States Department of Agriculture and seed money provided by the City of York Redevelopment Authority, the York City Fresh Foods Fund (FFF) is a revolving loan fund that has been created to modestly assist the development of new and existing restaurants and other food service establishments in the City of York.
Residential Tax Abatement Program (RETAP)	Incentives & Economic Development	York City	ReTAP provides for a 100%, ten (10) year tax exemption on the value of new residential construction or residential rehabilitation. This incentive runs with the land for ten (10) years. Therefore, if the property owner should change, the incentive remains under full valuation in year 11.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Tax Increment Financing (TIF)	Incentives & Economic Development	YCEA	TIF is a public financing tool used to fund public works or improvements for private residential, commercial or industrial development or revitalization through the allocation and dedication of all or a portion of the additional taxes resulting from increases in property values or from the increase in commercial activity as a result of a development or revitalization project.

7.4 Regional Resources

Regional-level entities also support economic development in York County, as well as the broader South Central Pennsylvania region. Top resources are profiled in the following table.

Exhibit 7-3: Current Regional Economic Development Programs and Resources				
Program / Resource	Topic Area/Strategy	Lead Entity	Contact	Overview
South Central Team Pennsylvania Inc. Regional Marketing	Incentives & Economic Development	South Central Team PA, Inc.	www.smartmarket.org	A network of local economic development agencies in eight (8) Pennsylvania counties (Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry and York) comprise the South Central Team Pennsylvania Inc., which manages marketing and branding for the region. The Smart Market brand, launched in 2004, is one (1) major branding initiative managed by the group that emphasizes the higher-education facilities available in the region and that each County is a “smart” choice for living and working. Components of the branding initiative include a website and logo used in promotional materials and at trade shows.
South Central Assembly	Incentives & Economic Development	South Central Assembly	www.southcentralassembly.org	This program is a broadly defined regional planning organization concerned with making the region a better place to live, work and play. The South Central Assembly is interested in addressing intergovernmental and inter-organizational issues where a collaborative approach will improve outcomes where the traditional frameworks are not so effective.

7.5 State Resources

The Commonwealth of Pennsylvania offers many programs and resources to further economic development in the State. Key tools and resources are listed in the following table.

Exhibit 7-4: Current State Economic Development Programs and Resources			
Program / Resource	Topic Area	Lead Entity	Overview
Rapid Response Team	Workforce Development	PA Department of Labor and Industry	When the Pennsylvania Department of Labor and Industry receives notice of pending business closures or layoffs, it brings together a team of economic development specialists (including YCEA and CareerLink) to assist the employer and employees in learning about available resources (e.g. unemployment insurance, health and pension benefits, job search activities, etc.), to provide potential economic development assistance to prevent business closure/reduce extent of planned layoffs.
Brownfield Redevelopment	Downtown Revitalization	Pennsylvania's Department of Environmental Protection - Southcentral Regional Office of Pennsylvania's Brownfield Action Team	Many downtowns include contaminated sites that are desired to be reused. Pennsylvania's Department of Environmental Protection, serves as a facilitator of brownfields redevelopment by offering incentives and fast-track permitting. Incentives include those offered through the industrial sites reuse program, the infrastructure development program, the hazardous sites cleanup fund (HSCF), the job creation tax credit program, the key sites initiative, the businesses in our sites program, the building PA program, the tax increment financing (TIF) guarantee program, the infrastructure facilities improvement program, the Section 108 U.S. Department of Housing and Urban Development (HUD) loan pool, the new PA venture guarantee program, the new PA venture capital investment program, the 2nd stage loan program, and the Pennsylvania infrastructure and investment authority (PENNVEST) brownfields loans program.
Building PA	Downtown Revitalization	Commonwealth of Pennsylvania – Department of Community and Economic Development	This State funding program provides mezzanine capital for real estate developers in small to mid-sized communities. Building PA has been used in downtown York on the Codo 241 project, a downtown redevelopment project.

Program / Resource	Topic Area	Lead Entity	Overview
Scenic Byways Designation	Incentives & Economic Development	State or Federal - DOT FHWA National Scenic Byways Program	Roadways may be designated as byways at both the national and State levels. The National Scenic Byways Program is funded by the U.S. Department of Transportation and the Federal Highway Administration for projects related to America's scenic byways (i.e. roads recognized for their national archaeological, cultural, historic, natural, recreational and/or scenic qualities). Pennsylvania has two (2) nationally-designated byways: the Historic National Road in southwestern Pennsylvania and the Seaway Trail in the northwestern part of the State. Pennsylvania also has its own byways program which allows local communities to seek State and/or Federal designation. York County currently does not have State or nationally-designated byways.

7.6 Non-Profit and Private Sector Resources

The non-profit and private sectors also provide tools and resources for economic development in York County. A selection of top relevant non-profit and private sector resources is provided in Exhibit 7-5a and contact information for lead entities is provided in Exhibit 7-5b.

Exhibit 7-5a: Current Non-Profit & Private Sector Economic Development Programs & Resources			
Program / Resource	Topic Area/Strategy	Lead Entity	Overview
Shared Community Kitchen - YorKitchen	Rural Areas; Downtown Revitalization	NutriCore NorthEast, Inc.	Through its partnership with NutriCore Northeast, Inc. (NCNE), YCEA created YorKitchen, a shared community kitchen available to entrepreneurs and farmers to develop value-added products.
MANTEC	Workforce Development	MANTEC	MANTEC is a resource created to provide manufacturers with customized solutions and to deliver measurable results in productivity, profitability and competitiveness.
Convention and Visitors Bureau (CVB)	Rural Areas; Downtown Revitalization	CVB	The CVB is the official tourism promotion agency for York County. Their vision is to positively impact economic development in York County through all forms of visitation.
Manufacturers Association	Workforce Development	Manufacturers Association	The Manufacturers Association is an advocate for manufacturing and related industries. Offering two (2) types of memberships to the community: General - manufacturing, and Associate - non-manufacturing, allows them to work with many types of organizations.
Realtors Association of York & Adams Counties (RAYAC)	Growth Areas	RAYAC	The mission of RAYAC is to meet the changing needs of its members, to foster a spirit of cooperation and communication between its members, and to assist members in providing optimum professional and ethical service to their clients/customers and community.

Program / Resource	Topic Area/Strategy	Lead Entity	Overview
York / Adams Smart Growth Coalition	Growth Areas	RAYAC	The Coalition is a unique and diverse group of organizations and individuals drawn together by a shared interest in the future direction of York and Adams Counties. The Coalition’s mission is to shape public policy in order to preserve those elements that make our communities a great place to live, work and play.
Farm and Natural Lands Trust of York County (FNLT) and York County Agricultural Land Preservation Board (YCALPB)	Rural Areas	Landowners	Landowners in rural areas may enter into conservation easement agreements with the County’s Agricultural Land Preservation Board or a land trust, such as the Farm and Natural Lands Trust of York County, to allow for the limiting of development in perpetuity, either through purchase or donation of development rights.
Business Associations and Chambers of Commerce	Growth Areas; Downtown Revitalization	Local Municipalities	Local municipalities have instituted their own business associations and Chambers of Commerce including, but not limited to, Red Lion Redevelopment Commission, Red Lion Business Association, Dillsburg Business Association, Hanover Area Chamber of Commerce, Southern York County Business Association, Spring Grove Chamber of Commerce, and the Springettsbury Business Association.
York County Community Foundation (YCCF)	Incentives & Economic Development	YCCF	The York County Community Foundation mission is to create a vibrant York County by engaging donors, providing community leadership, investing in high-impact initiatives and building endowment for future generations.
Agricultural Tax Incentives	Rural Areas	Landowners	Conservation easement donors may deduct up to 50% of their adjusted gross income, or if the donor’s income primarily derives from agricultural enterprise (i.e. farming, ranching or forestry), the donor may deduct all of his income over a 16 year period.
Horn Farm Center for Agricultural Education (HFC)	Rural Areas	HFC	The HFC promotes sustainable agriculture, the rich heritage of York County land and the importance of local agriculture to our economy. Additional programming includes an incubator farm program and community gardening.

Exhibit 7-5b: Contact Information for Current Non-Profit & Private Sector Economic Development Programs & Resources			
YorKitchen	37 W. Clarke Avenue	York, PA 17401	717-814-8879
MANTEC	227 W Market Street	York, PA 17401	717-843-5054
Manufacturers Association (MASCPA)	160 Roosevelt Avenue	York, PA 17401	717-843-3891
Convention and Visitors Bureau (CVB)	155 W Market Street	York, PA 17401	1-888-858-9675
Realtors Association of York & Adams Counties (RAYAC)	901 Smile Way	York, PA 17404	717-843-7891
York County Agricultural Land and Preservation Board (YCALPB)	118 Pleasant Acres Road, Suite F	York, PA 17402	717-840-7400
Farm and Natural Lands Trust (FNLT)	156 N George St., Ste 300	York, PA 17401	717-843-4411
York County Community Foundation (YCCF)	14 W Market Street	York, PA 17401	717-848-3733
Horn Farm Center for Agriculture Education (HFC)	4945 Horn Road	York, PA 17406	717-757-6441

7.7 Relevant Case Studies

Many communities have successfully implemented actions resulting in sustainable economic development in the strategy areas of: workforce development, growth areas, rural areas, downtown revitalization, and incentives and economic development. While no community provides a precisely comparable context to that of York County, there are communities that have similar issues to York County’s critical needs and that have targeted similar industry clusters with success.

The following three communities have been selected as models of successful sustainable economic development based on their history of strategic actions to address issues and industries and comparable characteristics to York County:

1. Frederick County, Maryland
2. Worcester County, Massachusetts
3. Greenville County, South Carolina

These communities are similar to York County in that each occupies an East Coast, non-coastal location, contains a large land area with a medium-sized central downtown city and includes manufacturing sectors as key industries. The communities also include smaller municipalities and feature some similar demographic and economic characteristics, as illustrated in Exhibit 7-6.

Exhibit 7-6: Demographic and Economic Comparison, 2010				
	York County, PA	Frederick County, MD	Worcester County, MA	Greenville County, SC
Land Area (Square Miles)	904.18	660.22	1,510.77	785.12
Population	434,972	233,385	798,548	451,219
Median Income	\$58,747	\$83,706	\$65,968	\$48,438
Largest City	City of York	City of Frederick	City of Worcester	City of Greenville
Population in Largest City	43,809	65,294	181,041	59,173
Manufacturers' Shipment's (2007 in \$1,000s)	11,957,398	3,003,696	10,706,055	10,821,412

Source: U.S. Census Bureau, State & County QuickFacts

Frederick County, Maryland

Context:

Frederick County serves as a model for using quality of life to attract and retain a young and educated workforce that has supported its emerging bio-medical and renewable energy sectors (with emphasis on pharmaceutical manufacturing and solar panel manufacturing). Quality of life planning focus areas include downtown revitalization and agriculture (with the latter also being a target industry for economic development). Frederick County also offers model techniques for creating an education roundtable focused on science, technology, engineering and mathematics education and using mapping tools for site selection.

Similarities to York County:

- Situated roughly an hour northwest of Washington, DC, the County used to be primarily a bedroom community but has emerged with a stronger jobs base in recent years.
- Offers historic downtowns, with a centrally located City (County seat) and small downtowns throughout the County (some of which are Maryland designated Main Streets).
- Targeted and attracted agriculture, biotechnology, and advanced technology, including renewable energy manufacturers (solar panel manufacturing) and pharmaceutical manufacturing.
- Defense contracting and health care are also strong economic sectors.
- Provides many agricultural and recreational resources in rural areas.

- Has made downtown revitalization and quality of life amenity development a strong aspect of economic development.
- Has developed strong partnerships between the City, County and Non-Profit Sectors.

Top Strategies:

- **Quality of life efforts:** The City of Frederick and Frederick County actively support downtown revitalization and agricultural initiatives with the recognition that these elements play an integral role in the quality of life that has attracted and retained a strong workforce as well as emerging industries. Business leaders in the pharmaceutical and solar panel manufacturing fields have credited the character and quality of living in Frederick County, with its attractive downtown and many recreational offerings, as well as its educated workforce, as important reasons for locating in the County. Selected notable efforts to improve quality of life include those related to special events, downtown revitalization and agriculture.
- **Marketing of downtown events to Washington, DC region:** The Main Street program in the City of Frederick, Downtown Frederick Partnership, has made marketing its special events to the broader regional Washington, DC, market a key aspect of its promotions program. In this vein, advertisements for the organization’s popular First Saturday events are included in the Washington Post and the free circular given to Washington Metropolitan Area Metrorail riders, as well as the local Frederick News-Post. As a result, the attendance at the monthly First Saturday events has broadened to include day-trippers from the region; store owners report customers visiting from as far as Washington, DC, Northern Virginia, Baltimore, southern Pennsylvania and West Virginia.
- **Family oriented downtown events:** The City of Frederick Office of Special Events and Downtown Frederick Partnership (the non-profit Main Street organization) provide an array of special events throughout the year appealing to families. These events bring parents and their children to the City, and increase the area’s appeal to prospective young working residents. At the 75-acre Baker Park adjacent to downtown, the City programs weekly summer concerts and children’s theatrical performances that attract young families. Downtown Frederick Partnership integrates special events programming for children into its monthly First Saturday series. Downtown Frederick Partnership continually looks for ways to improve its special events programming and offer unique draws for families and individuals, and regularly identifies new themes and activities by staying aware of events offered in other downtown communities across the nation and through the innovative ideas of member business owners. Individual sub-committees include: Business Development Committee, Design Committee, Organization Committee, and Promotions Committee.

- **Carroll Creek Redevelopment:** Since the 1970s, the City of Frederick has been working on a major public and private redevelopment project along Carroll Creek, which bisects the downtown. In 1976, a downtown flood devastated downtown businesses and threatened to jeopardize future investment in downtown buildings. In response, the City embarked on a major flood control project to channel Carroll Creek’s waters into underground conduits. The project includes large pedestrian walkways on both sides of a narrow canal and became the subject of master plans for its conversion into a world-class linear park surrounded by mixed-use development. The City has since completed investment in landscaping, public art and other “creekscape” features along Carroll Creek, including several different types of bridges. Private sector development has included market-rate condominiums, office space and ground-floor restaurant and café space. On evenings and weekends, the linear park bustles with young couples, families and individuals sitting on benches, peering into the canal, or dining at outdoor tables.
- **Agricultural Services:** With the most agricultural acres of any County in Maryland, and since agriculture is one of the County’s target industries for economic development, Frederick County’s Office of Economic Development includes a business development department that focuses on the agricultural industry. The department assists business owners with agricultural business plans for start-up or expansion, provides information on the industry, serves as a liaison, promotes and educates County citizens on agriculture’s benefits, and encourages the expansion and relocation of agricultural industries in Frederick County. The Office of Economic Development also works closely with the Frederick County Agriculture Business Council to identify and support innovative approaches to supporting and promoting agriculture.
- **Ag-related marketing:** As part of its charge to promote the agricultural industry and educate citizens on its benefits, the Frederick County Office of Economic Development has implemented marketing campaigns that increase awareness of local agriculture. Notable campaigns include the Homegrown Here local branding campaign, which features a logo for display in restaurants, on menus, at farmers markets and in grocery stores. The brand’s intent is to raise awareness among citizens that the products support local farmers as a “buy local” campaign. Marketing efforts also include the Frederick County Virtual Farmers’ Market, a website which provides information on the Homegrown Here campaign, on special events related to agriculture, and on local farms (with an inventory of farms that includes their products and activities as well as contact information). The website also allows citizens to purchase farm products on line, allowing it to serve as a real market as well. The inventory of farms provided in the Virtual Farmers’ Market is available in print at Frederick County Tourism Centers, Frederick County Libraries, participating farms and the Office of Economic Development.

- **Virtual inventory of agricultural resources:** In addition to providing many virtual marketing elements, the Frederick County Office of Economic Development offers an inventory of resources for agricultural industry development through its website, allowing agricultural business owners web access to information on available County, State and national programs.
- **Roundtable for Education:** The Frederick County Business Roundtable for Education (FCBRE) is a 501c(3) group led by the Frederick Chamber of Commerce tasked with addressing the workforce needs of local employers, with a special focus on science, technology, engineering and mathematics education. They continue to work to develop strong connections between classroom learning and the business community and to promote academic excellence.
- **Mapping of economic development sites:** Both Frederick County’s Office of Economic Development and the City of Frederick use maps to highlight economic development sites. The County’s Office of Economic Development recently launched a Geographic Information Systems mapping tool online through coordination with the County’s GIS specialists that includes major business parks and shopping centers in the County. The mapping tool is geared to allow site selection professionals instant access to site data, including information on zoning, access to major roadways, parcel size and nearby businesses. The tool allows users to search for available space and building lots and print or save PDF reports on one or more selected sites. The tool will save businesses time and money in the site selection process and offers Frederick County a competitive edge in attracting commerce.

The City of Frederick also provides a map and inventory of business parks in the City on its economic development website. One unique aspect of the maps provided on the City’s website is the inclusion of the downtown node and commercial corridors alongside traditional suburban business parks, which gives those areas equal weight and attention against traditional business parks.

Lessons Learned:

- Special events can be used to simultaneously support small businesses downtown and attract and retain younger families, which in turn provides a younger workforce.
- Special events should not become static but rather innovate regularly and expand through ideas from local business owners and peer communities.
- Public investment in catalytic projects, such as Carroll Creek, can increase the number of visitors to downtown and facilitate private sector development.

- Agriculture can be supported with formal economic development staff devoted to the industry that work with existing industry resources (such as the Agricultural Business Council) to identify and implement innovative actions.
- Branding and marketing can support agriculture by boosting the awareness of local citizens of opportunities to buy local.
- Virtual media offers a powerful tool for economic development, including the digital mapping of sites which allows site selection decision-makers 24-hour access to site information and the provision of virtual farmers markets which allow citizens to buy local farm products from the comfort of home.
- Chambers of Commerce can partner with non-profit foundations to provide a conduit for tax-deductible contributions to support roundtable for education activities.

Worcester County, Massachusetts

Context:

Worcester County, Massachusetts, offers an example of how a County of historic “Mill Towns” that served as manufacturing centers in the Industrial Revolution can transition to take advantage of emerging industries. In particular, the economic resurgence of the City of Worcester offers instructive lessons in stimulating redevelopment, developing emerging industries, and making creative reuse of abandoned warehouses and brownfield sites by defining unique market niches.

Similarities to York County:

- With a strong manufacturing past, Worcester has many adaptive reuse sites (including many brownfields) in its downtown to target for economic development, analogous to York County’s many adaptive reuse sites.
- Target industries include bio-medical (including biotechnology, pharmaceutical, medical device sub-clusters), renewable energy and health care.
- Attraction of a young and educated workforce is a top priority.
- Manufacturing remains a major employment sector in the County, with specializations in industrial machinery and equipment, fabricated metal products, and plastics.
- Worcester has grappled with defining market niches for different areas of the County, similar to York County’s need to differentiate planning regions, and has developed different plans within the City’s downtown.
- While the attraction of industry has allowed greater opportunity for living and working in the same County, the City of Worcester is also taking advantage of its access to Boston’s employment and attracting younger commuters seeking affordable, mixed-use, downtown living.

Top Strategies:

- **Efficient permitting process:** Communities in Worcester County and the City of Worcester have adopted (and continue to adopt) more efficient processes for the permitting of desirable economic projects.

In Massachusetts, the Priority Development Sites program created through Chapter 43D (enacted in 2006) allows for more efficient permitting in order to reduce the transaction costs and financial risk associated with the typical municipal permit process. To participate in the program, sites must be approved as Priority Development sites both through a local authority and Massachusetts' Interagency Permitting Board. To be eligible for designation, sites must be zoned for industrial, commercial or mixed-use development and accommodate development or redevelopment of at least 50,000 square feet of gross floor area. The program carries with it an incentive for municipalities: those that opt to participate and comply with the mandatory 180-day timeline receive grants of up to \$100,000.

The City of Worcester has used the designation for a project in South Worcester and is currently undergoing its downtown CitySquare redevelopment project as a Priority Development Site which allows for more efficient permitting, which will reduce the traditional permitting process from a year (or longer) to the 180- day timeframe specified by the State law.

In addition to the Priority Development Sites program, the City of Worcester has at its disposal the Interdepartmental Review Team (IRT), a group comprised of representatives from the following City departments: Inspectional Services, Public Works and Parks, Conservation Commission, and Economic Development. The IRT group meets once weekly to review development proposals as a team, which allows for a “one-stop shop” experience for developers in which all areas of expertise and assistance are brought together for proposal review.

- **Location Worcester:** As part of its commitment to providing an efficient development process for developers, the City of Worcester has created a site search assistance process and mapping service that builds from the City's relationship with the local real estate community, the Massachusetts Department of Environmental Protection and the Massachusetts Department of Fire Services. The tool not only offers a way for the Economic Development Division to serve as the first point of contact on site selection, but it also allows the City to develop understanding of trends in the site and building requirements of prospective businesses (i.e. cost, geography, square footage, floor plans, ceiling heights, parking, rail or highway access, loading docks, utility capacity, etc.).

The site search process consists of: 1) prospective company contacts the Economic Development Division with interest in site, 2) the prospective company completes a Site Requirement Form along with identification of broker status (if a broker has been retained), 3) Economic Development Division distribution of site needs to community broker list, 4) response from community brokers with Property Listing sheet, 5) compilation of community broker responses and provision of site search result report to prospective company or its retained broker.

The City's mapping service is provided through GoogleEarth, a free satellite imagery and mapping program, to which the City's Geographic Information Services Manager has provided two sets of site data: 1) Waste Sites/Reportable Releases from the Massachusetts Department of Environmental Protection and 2) the Underground Storage Tank Registry from the Massachusetts Department of Fire Services.

- **Brownfields redevelopment:** The City of Worcester offers an innovative Brownfield Cleanup Revolving Loan Fund (BCRLF) program through a \$1.3 million grant from the United States Environmental Protection Agency. The BCRLF offers a number of options to developers, eligible property owners, and other community stakeholders interested in the cleanup of brownfield properties: discounted loans and grants, Federal and State tax incentives, State financing incentives, cleanup insurance subsidies, and predevelopment assistance.

With the database formed, the City created its Site Search Assistance. The Site Search Assistance Program, administered by the Division of Business Assistance, is designed to identify available land and building space in coordination with local real estate professionals and property owners. The program coordinates development efforts with the knowledge and resources of the commercial real estate community to meet the real estate needs of companies, small businesses and developers, helping them locate, stay and grow within the city.

This coordination allows the Division of Business Assistance to take a proactive approach in retaining and expanding existing businesses and attracting new businesses to Worcester. This tool also helps in identifying and understanding the unique requirements of new businesses, including cost, geography, square footage, floor plans, ceiling heights, parking, rail or highway access, loading docks, utility capacity, etc.

- **Establishing market niches:** In the City of Worcester, the City and its partners are working on creating neighborhoods with definable niches. One such neighborhood is the North Main/Lincoln Square Area, the City's traditional cultural center and home to its grand public spaces.

The CitySquare project in downtown Worcester is a \$563 million multi-phased private/public commercial real estate project and the largest development project in the commonwealth of Massachusetts outside of the Boston area. The project will create an urban shopping, living and working environment that will feature destination dining, shopping and entertainment uses. Rather than focusing on graduate student housing as a residential niche, CitySquare includes housing for active adults (age 55 and older).

- **Integration of zoning with industry recruitment:** Within Worcester County, several municipalities have used and are planning to use the local zoning code to recruit target industries. The Town of Clinton, which has a population of approximately 7,390, approved a bioscience enterprise overlay district to convey clearly to bio-medical firms that the Town is friendly to the industry. The approach has already been tested with success in the region, as the City of Worcester specifically included biotechnology as a use in its zoning law. The Massachusetts Biomedical Initiatives (MBI), an organization that helps entrepreneurs in the biotechnology field, credited the zone as a major factor in its decision to locate in Worcester.

Lessons Learned:

- Efficient permitting should be targeted to sites meeting criteria for economic development and involves both an expedited review process (180-day timeframe in Worcester’s case) and the availability of a team review process that brings multiple types of review together in a one-stop shop environment.
- Virtual site selection and mapping of sites for economic development can offer a unique tool for site selection professionals and provide local staff with a mechanism to track the site needs of target industries.
- Redevelopment of brownfields requires multiple approaches, including indirect methods to stimulate redevelopment as opposed to solely relying on direct financial incentives. The City of Worcester has successfully used the cooperation of public and private stakeholders, the collection and distribution of information on sites, and the overall coordination through a City staff position to catalyze redevelopment.
- The identification of market niches for different neighborhoods is an important component of downtown revitalization, and major anchor developments (such as CitySquare in downtown Worcester) can serve as focal points for market niches.
- Explicitly zoning for desired industries can attract industry, as Worcester’s experience with biotechnology and the attraction of the Massachusetts Biomedical Initiatives (MBI) demonstrates.

Greenville County, South Carolina

Context:

Greenville County, South Carolina provides a model for planning and implementing revitalization and development downtown and along commercial corridors, and for attracting both major industry and new residents and businesses downtown. The City and the County's economic development organizations have made good use of the Internet to publicize the County's high quality of life, available business incentives, and downtown properties available for commercial and residential activities. The City has also prepared both downtown and corridor master plans that have specified different market-supported niches for different areas and offers a history of taking action to stimulate private sector involvement.

Similarities to York County:

- County contains similar demographics, with a population of approximately 451,219 in 2010 and median income of \$48,438
- Provides a centrally-located, large historic downtown as well as a variety of commercial corridors (some of which serve major industry, while others serve local neighborhoods).
- Includes manufacturing and innovation as central to the local economy.
- Has experienced rapid growth in past years.
- Home to both small local firms and large international corporations.

Top Strategies:

- **Quality of life marketing through Economic Development website:** Both the City of Greenville's Economic Development Department (GADC) and the Greenville Area Development Corporation provide information on quality of life via the web, providing models for using the web to simultaneously market to site selection professionals and prospective new residents/employees.

GADC's website contains many links to information on area amenities, including a special focus on Downtown Greenville. Demographic data is provided through links to U.S. Census reports on the County, and educational resources and attainment are emphasized with web content on area institutions, educational attainment levels and SAT scores. Cost of living information is included within the site.

The City Economic Development Department's main page immediately highlights the City's top strengths with images and text, including: business environment, location, quality of life, and transportation. Links are provided to the City's high-profile projects including the Millennium Campus (private research and development campus) and the International Center for Automotive Research. A link from the main page takes visitors to

a description of Greenville’s quality of life, with images and text describing the City’s strengths in terms of housing, climate, schools, entertainment and culture, and medical facilities. Links to more information on the City’s downtown and historic districts are repeatedly offered to elevate these areas to visitors as prospective places to live and/or recreate.

- **Online guide to business incentives:** Both the City of Greenville’s Economic Development Department and the GADC offer virtual guides to financing and business incentives with descriptions of assistance programs for development and business expansion, along with links to more information. GADC’s guide includes a section devoted to existing industry support, with description of available employee recruitment and training programs that help employers navigate the local web of area workforce service providers.
- **Significant downtown planning history:** Downtown Greenville has risen from a mostly vacant, run-down business district in the 1970s to a vibrant center of activity with over 90 unique shops and restaurants today. County economic development leaders have recognized the role downtown plays in the County’s high quality of life and market downtown as one key quality of life amenities on GADC’s website.

The City’s significant downtown planning history spans over 35 years to its beginning in 1977 when City leaders determined that the downtown needed to offer a distinctive, differentiated environment as compared to surrounding areas. With that guiding principle, the City began work on downtown master planning that focused on changing the image of downtown and using public-private partnerships to create mixed-use anchors. The downtown planning effort has included many catalytic projects, which include, but are not limited to:

- **Main Street streetscape design:** By 1979, just two years after initiating plans for the downtown area, the City of Greenville completed physical investment in a transformed streetscape. Improvements included: a reduction of the road width of Main Street from four lanes to two, the widening of sidewalks to allow for more walking and outdoor dining, the planting of street trees, and the replacement of parallel parking with diagonal parking spaces.
- **Greenville Commons:** The downtown’s first successful mixed-use anchor created through public-private partnership was Greenville Commons, a facility that included a Hyatt Regency hotel, convention center, office, retail, parking and public plaza/atrium. Federal grants enabled the City to purchase the land and build the convention center, parking and public space and then lease air rights for

the private hotel and office spaces. Over time, federal grants for such developments have dwindled, but innovative sources of funds have allowed the City to continue to participate in other mixed-use projects. These innovative financing and funding sources include: tax increment financing (TIF), accommodation and hospitality taxes, and parking revenue bonds.

- **Peace Center for the Performing Arts:** Downtown Greenville contains a river, waterfall and park, but before the City worked with the private sector to create the Peace Center for the Performing Arts, a deteriorating industrial area cut those recreational assets off from downtown. The City acquired the property through tax increment financing (TIF) and a financial boost from a private family (\$10 million commitment to the project), invested in landscaping and amenities, and ultimately created a performing arts center that also featured housing, restaurants, offices and retail shops in renovated historic spaces. The project was key in bringing people downtown on nights and weekends and in linking the downtown to the river, waterfall and park amenities.
- **West End Market and Historic District:** Like the Peace Center for the Performing Arts, the West End Market was conceived as another major downtown anchor to bring in residents and tourists from surrounding areas. The City acted as the developer of this project and created a market consisting of retail shops, restaurants, a traditional farmers' market, and artisan and office space. Financing for the project was provided through tax increment financing (TIF), a HUD Section 108 loan, grants, general funds, and the sale of personalized bricks. In 2005, the City of Greenville sold the West End Market for a net profit that the City will invest in other projects.
- **Falls Park on the Reedy:** The City is completed a renovation of Falls Park, which winds through downtown and includes the Reedy River Falls. Major elements of the renovation include the \$4.5 million Liberty Bridge, a suspension bridge over the Reedy River that serves as a destination for tourists and provides a view of the Reedy River Falls. The park investment project dates to 1990, when a landscape architecture plan for the park identified its potential to serve as a regional attraction with gardens and a pedestrian bridge.
- **Online publication of available downtown properties:** Through the City's Economic Development Department website, a series of links on downtown Greenville include a link to a listing of available downtown commercial space to provide prospective new businesses with a virtual gateway to Greenville's real estate community. The property descriptions include an image, address, size of space (or range if the space may be

subdivided), asking lease rate per square foot and/or asking sale price, and broker contact. GADC also provides links on its website under its description of Downtown Greenville to the City's website for those interested in learning more about downtown.

- **Online publication of downtown apartments and condominiums for rent:** Based on information from Greenville County tax records, the City's Economic Development Department has prepared a virtual inventory of downtown apartments and condominiums to offer prospective residents information on rental rates and sales prices. The inventory includes description of each building/project, including address, total number of units, rental range per month or average sales price, and property manager or real estate broker contact information. This inventory is in addition to another web page on the site that describes different downtown neighborhoods and therefore serves as a virtual guide for newcomers.
- **Preparing corridor master plans and identifying niches for corridors:** While the City of Greenville offers many lessons for downtown development, it has also undertaken master planning studies that offer models for planning for commercial corridors. The studies include market evaluations to define appropriate niches for the corridors and identify actions for implementation. As a result of the plans, physical investment in different corridors has materialized. The City has worked with the local business association on the Augusta Road corridor to invest in physical improvements along the corridor, including replacing utility poles and introducing character-defining features like mast arms at intersections and landscaping investment. As a result of master planning efforts along the Church Street corridor, the roadway will be reduced to a four-lane boulevard with a planted median and wider sidewalks to create a more pedestrian-friendly environment as called for in the plan.

Through corridor master planning efforts, the City of Greenville has identified Laurens Road as one of the City's major commercial corridors and an area for expanded commerce. Known as Motor Mile because of its many car dealerships, the corridor also includes the new Automotive Research Park (a joint venture of Clemson University and BMW) and the International Center for Automotive Research (ICAR), which will serve as a premier center for training and advanced education in automotive engineering and motorsport technology. Millenium Campus is a major ongoing addition to the Laurens Corridor that will complement the Automotive Research Park and International Center for Automotive Research in providing a master-planned technology park that will further brand Greenville as a center for research. The campus is envisioned to include a mix of life-science, biomedical, pharmaceutical, financial, automotive and aerospace business and industry.

Lessons Learned:

- The public sector can act as an entrepreneur and should be willing to take calculated risks.
- Innovative financing options are available to allow public participation in development.
- The public sector can incentivize development through monetary and non-monetary methods. Greenville has used the following non-monetary approaches to facilitate development:
 - Encouraging mixed uses and offering flexible parking requirements through ordinances.
 - Providing expedited permitting.
 - Offering a point person within the public sector to guide the private project and help mediate conflict.
 - Bringing together a team of building and inspection professionals from within the public sector to assess development feasibility issues early in the process.
 - Involving public sector staff, such as those in public works and the police, that will be involved in the day-to-day logistics of mixed-use living early in the process so they become cognizant of logistical issues concerning garbage collection, noise and security.
- Master planning on a small-area scale (i.e. downtown and corridor levels) that includes market evaluation is an important step toward defining appropriate niches for development and investing in the physical environment to set the stage for private investment.

7.8 Summary

Many programs and resources are available to York County and its municipalities to further economic development in the Strategy areas of workforce development, growth area, rural areas, downtown revitalization, and incentives and economic development. Obviously, as new programs are developed and added to meet evolving needs and demands for new economic development strategies, this list of identified programs and resources will expand.

Chapter VIII

Economic Impact Assessment

8.1 Overview

Market conditions and trends indicate that York County is positioned to attract office and retail development over the next ten (10) years. While the precise level of development is difficult to predict, development on the order of 2.5 million square feet of new space is projected. These estimates were prepared in consideration of past employment growth trends and trends occurring in those industries that typically occupy office and retail space.

To provide some insight into the type of economic and fiscal impacts that would be associated with the development of 2.5 million square feet of new office and retail space, an economic and fiscal impact evaluation of the potential development was performed.

Based on the Bureau of Labor Statistics RIMS II Input-Output Model, a measurement of the economic impact (e.g. income tax, property tax, sales tax, etc.) of the development of the 2.5 million square feet during the construction period and during annual operations at full build out was conducted. The Bureau of Economic Analysis' RIMS II model was used to estimate indirect, or induced, impacts (e.g. income and sales tax benefits) to York County, York County municipalities and school districts, and to the Commonwealth of Pennsylvania as a result of the new investment in the area. Impacts were measured in direct terms (on-site development impacts) and in indirect/induced terms. For this 2014 Economic Development Plan Update, the economic impacts were calculated based on the rates used in the 2008 Plan.

8.2 Economic Development Program (Build-Out Potential)

It is estimated that York County economic development will total over 2.5 million square feet of development. This includes approximately 0.5 million square feet of office space and approximately 2.0 million square feet of retail space. Industrial is not included because of the projected loss in total square feet. Exhibit 8-1 indicates the estimated build-out potential for York County.

Exhibit 8-1: Projected Build-Out Potential York County	
	Gross Buildable Area in Square Feet
Office	458,250
Retail	2,059,511
Total	2,517,761

Source: York County Planning Commission

8.3 Construction Period Economic and Fiscal Impacts (Constant 2008 Dollars)

As a result of the construction of this new development, a variety of new economic opportunities will be created during the construction period. The construction of this new space will create 7,323 direct on-site jobs with an aggregate payroll of approximately \$237 million. Furthermore, these direct jobs will create 6,464 additional indirect, or spin-off, jobs off-site, with an aggregate payroll of approximately \$204 million. Direct consumer expenditures by employees during the construction period will total roughly \$237.7 million, while an estimated \$249.6 million in material purchases will be made in the County. All amounts are in constant 2008 dollars to avoid counting any inflationary impacts. This information is displayed in Exhibit 8-2.

Exhibit 8-2: York County Economic Impact Construction Period (2008\$)			
	Direct	Indirect	Total
Jobs (FTE)	7,323	6,464	13,787
Payroll	\$249,721,477	\$204,387,284	\$454,108,761
Material Purchases (regional)	\$249,585,648		\$249,585,648
Consumer Expenditures	\$237,690,520		\$237,690,520

Source: York County Planning Commission using rates from 2009 Plan

The related fiscal impact of the construction, as demonstrated in Exhibit 8-3, will be approximately \$29 million in tax revenue to the Commonwealth and local York County municipalities and school districts. This includes \$8.8 million in Commonwealth income tax from construction workers, approximately \$1million in local earned income tax paid to York County municipalities and other local jurisdictions, \$224,749 in local services taxes paid to York County municipalities, approximately \$12 million in sales tax of materials purchases made in the Commonwealth, approximately \$2.9 million in spin-off sales tax revenue, and a little over \$4 million in building permit fees to local municipalities. All tax figures are in constant 2008 dollars to avoid including any inflationary impacts.

Exhibit 8-3: Fiscal Impact Construction Period (2008\$) York County Build-Out				
Annual Fiscal Impacts	York County	Commonwealth	Local Jurisdictions	Total
Income Tax	-	\$8,865,112	-	\$8,865,112
Local Earned Income Tax	-	-	\$998,886	\$998,886
Local Services Tax	-	-	\$224,749	\$224,749
Direct Sales Tax	-	\$11,980,111	-	\$11,980,111
Indirect Sales Tax	-	\$2,876,055	-	\$2,876,055
Building Permit Fees	-	-	\$4,091,362	\$4,091,362
Total	-	\$23,721,278	\$5,314,997	\$29,036,275

Source: York County Planning Commission using rates from 2009 Plan

Exhibit 8-3 also shows that the Commonwealth of Pennsylvania will receive approximately \$23.7 million in tax revenue of which \$8.8 million will be in income tax (from construction workers living in the Commonwealth), \$12 million in sales tax of materials purchases made in the Commonwealth and \$2.9 million will be receipts of indirect (or spin-off) sales tax revenue (from retail purchases made by construction workers in the Commonwealth). It is projected that York County local municipalities will receive a total of \$5.3 million in revenue. This includes approximately \$1 million in local earned income taxes, \$224,749 in local services taxes (emergency and maintenance fees), and over \$4 million in building permit fees.

8.4 Operating Period Economic and Fiscal Impacts (Constant 2008 Dollars)

Once construction is completed and market absorbed, impacts related to the development operations will continue on an annual basis. As presented in Exhibit 8-4, the York County build-out will facilitate development (with an estimated market value of over \$611 million) that will create 3,777 direct on-site jobs with an aggregate annual payroll of \$140.6 million. Furthermore, the development will create an additional 4,287 indirect, or spin-off, jobs off-site as a result of expenditures made by the development’s employees. These indirect jobs will have an aggregate annual payroll of \$136.2 million. These wages and salaries of development employees will generate \$116.7 million in annual consumer expenditures. Build-out of retail development will have a direct economic impact of \$71.1million in annual on-site retail sales.

Exhibit 8-4: Economic Impact Annual Operations at Build-Out (2008\$) York County			
	Direct	Indirect	Total
Jobs (FTE)	3,777	4,287	8,064
Payroll	\$140,613,933	\$136,288,017	\$276,901,950
Consumer Expenditures	\$116,720,631		\$116,720,631
Retail Sales (on site)	\$71,071,809		\$71,071,809

Source: York County Planning Commission using rates from 2009 Plan

Furthermore, Exhibit 8-5 shows that the related fiscal impact during annual operations at build-out will be approximately \$34 million in tax revenue to the Commonwealth and local York County municipalities and school districts. This includes \$4.2 million in income tax from employees within the developments, approximately \$.5 million in local earned income taxes, \$126,553 in local services taxes, \$23 million in real property taxes, \$3.6 million in direct (on-site) sales tax revenue, \$1.75 million in indirect (or spin-off) sales tax revenue (made by development employees in the Commonwealth), and \$426,431 in corporate franchise taxes from the newly-created businesses.

The Commonwealth of Pennsylvania will receive \$10 million in tax revenue. Of this total, \$4.2 million will be in income tax (from development employees living in the Commonwealth), \$3.6 million will be in direct (on-site) sales tax revenue, \$1.75million in indirect (or spin-off) sales tax revenue (made by development employees in the Commonwealth), and \$426,431 will be in corporate franchise taxes.

York County will receive a total of approximately \$2.5 million in annual tax revenue once the build out is complete. These revenues are entirely from real property tax sources. Local municipalities (and local school districts) in York County will receive approximately \$21 million in tax revenue once the developments are fully built-out. This includes \$20.5 million in real property tax revenues, \$464,026 in local earned income tax revenues, and \$126,553 in local services tax revenues.

Exhibit 8-5: Fiscal Impact York County Operations Period (2008\$)				
Annual Fiscal Impacts	York County	Commonwealth	Local Jurisdictions & School Districts	Total
Income Tax	-	\$4,218,418	-	\$4,218,418
Local Earned Income Tax	-	-	\$464,026	\$464,026
Local Services Tax	-	-	\$126,553	\$126,553
Real Property Tax	\$2,477,590	-	\$20,542,162	\$23,019,752
Direct Sales Tax	-	\$3,624,662	-	\$3,624,662
Indirect Sales Tax	-	\$1,750,810	-	\$1,750,810
Corporate Franchise Tax	-	\$426,431	-	\$426,431
Total	\$2,477,590	\$10,020,321	\$21,132,741	\$33,630,652

Source: York County Planning Commission using rates from 2009 Plan

8.5 Summary

As can be seen, the projected 2.5 million sq. ft. of new office and retail space is expected to have positive economic and fiscal impact both during initial construction and as part of annual operations. The economic impacts, as measured in jobs, payroll, material purchases, and consumer expenditures, are projected to be greater as part of the initial construction phase, while the fiscal impact will generate more revenue from taxes as part of annual operations.

Based on build-out potential, retail is projected to account for 80% of the total increase in square footage. This is due to the demands generated from increased population as measured in number of households. It can be surmised that those municipalities with higher population densities and adequate infrastructure to support additional retail square footage will see the most financial returns, both initially and overtime through local service taxes and real property taxes.

Chapter IX

Action Plan

9.1 Overview

At the five (5) year mark of the original Economic Development Plan adopted in 2009, the York County Planning Commission and the York County Economic Alliance staff reviewed the Plan's strategies and the progress that has been made to implement them. Through this review process, along with reflection and analysis of the current economy, some existing strategies were modified, some were deleted, and new strategies emerged. It also became apparent that economic development over the next ten (10) years in York County will continue to require a coordinated plan of action, particularly to enhance the County's competitive position for attracting top industries (e.g. renewable energy, bio-medical, and health care) and to provide a range of strategies suitable for diverse planning regions.

Many accomplishments and much progress have been made relative to the 2009 Plan strategies. Originally there were 149 identified strategies and approaches. Each one of these has been addressed in some way; some were implemented and are on-going, some were modified and some were removed. This update has identified and added 14 new strategies to address moving forward.

This Chapter outlines in detail the carry-over and newly identified goals and strategies to move York County forward in economic growth. The Updated Economic Development Action Plan is broken into five (5) broad strategy categories as listed below.

1. Workforce Development,
2. Growth Areas,
3. Rural Areas,
4. Downtown Revitalization, and
5. Incentives and Economic Development.

Associated implementation items, including an approach, lead agency and partners, are identified for each strategy. Exhibit 9-1 provides a summary of this information. The strategies and approaches provided are meant to be tailored over time to respond to changing needs and conditions. As such, the York County Economic Development Plan will function as a living and changing document to work toward the desired outcomes established in the Countywide vision for economic development. The Economic Development Plan and its strategies will be reviewed annually by YCPC and YCEA, and will be used by each of these entities as a planning and economic strategy guide to formulate future policy and actions.

Exhibit 9-1: Strategies and Approaches of the York County Economic Development Plan			
Strategy	Action	Lead Entity	Partner(s)
Workforce 1A	Inventory of Workforce Providers	YCEA	YCAL; York County Workforce Service Providers
Workforce 1B	Workforce Forums with Employers	YCEA	Workforce Service Providers; YCAL; Area Employers
Workforce 2	Networks for a Young Workforce	YCEA	York Young Professionals; York SCORE; Leadership York
Workforce 3	Form a Public Education Advisory Group	YCAL	YCEA; Higher Education Institutions; Local School Districts; Local Foundations
Workforce 4	Market and Support Quality of Life Amenities	YCEA	Creativity Unleashed, York City
Growth 1	Sample Code Language	YCPC	York/Adams Smart Growth Coalition; York County Zoning and Building Permit Officials Association; YCEA
Growth 2	Corridor Plans	YCPC; YCEA	Local Municipalities
Growth 3	Track and Monitor Growth	YCPC	YCEA
Growth 4	Model Permitting Process	YCPC	York/Adams Smart Growth Coalition; York County Zoning and Building Permit Officials Association
Growth 5	Infrastructure Planning Considerations	YCPC	YCEA
Rural 1	Information Outreach	YCALPB, YCPC	FNLTL; Penn State Cooperative Extension; YCABC; FSA; YCEA
Rural 2	Strong Local Food System	YCFA; YorKitchen	YCEA; FNLTL; Penn State Cooperative Extension; Horn Farm Center; York Buy Fresh Buy Local; YCABC
Rural 3	Strong Agritourism Strategy	YCEA; YCPC	YCABC; Penn State Cooperative Extension; Susquehanna Gateway Heritage Area; YCCVB
Rural 4	Sustainable Farming Strategy	York County Conservation District; YCALPB	Penn State Cooperative Extension; Horn Farm Center; USDA; YCFA
Downtown 1	Downtown Economic Development Program	YCEA; YCPC	Downtown Inc.; Local Municipalities; Local Non-Profits; Local Downtown Groups; York SCORE; Community First Fund; York City; Main Street Hanover
Downtown 2	Sample Code Language for Downtown Issues	YCPC; York City	YCEA; Local Municipalities; Local Downtown Groups; York/Adams Smart Growth Coalition; Neighborhood Associations; Pennsylvania Downtown Center
Downtown 3	Downtown Plans	YCEA	Local Municipalities; YCCVB; YCPC; York City; Moving Plans into Action; Pennsylvania Downtown Center; Downtown Inc.; Main Street Hanover
Incentives & Economic Development 1	Expand Information Outreach	YCEA	Local Municipalities; YCPC
Incentives & Economic Development 2	Educate Businesses and Communities	YCEA	OWD; Local Developers
Incentives & Economic Development 3	Renewable Energy Incentives	YCPC; Pennenergy or Manufacturers Association	Pennsylvania Office of Energy and Technology Development; Pennsylvania Department of Community and Economic Development; Pennsylvania Department of Environmental Protection
Incentives & Economic Development 4	Expanded Sites Database	YCEA	YCPC; RACY; Local Brokers

9.2 Workforce Development

York County needs to develop and sustain a workforce that includes: younger workers to replace retirees, skilled and educated workers to fill gaps in manufacturing and research and development for the renewable energy and bio-medical industries, and workers to fill critical shortages (e.g. nurses in the health care sector). The following strategies offer steps toward addressing those needs.

Strategy 1: Provide a clearinghouse for workforce development through YCEA's Office of Workforce Development (OWD).

Strategy 1A: Prepare an inventory of workforce providers, including all training and educational programs, updated twice yearly, and market to job seekers and employers through digital and print media.

Purpose: To provide a consolidated inventory of workforce service providers through convenient digital media to allow workers and employees convenient access to information on workforce programs.

Approach:

1. Build and maintain a database of workforce service providers with descriptions of available services, training and educational programs and contact information.
2. Build and design an attractive, easy to navigate website that may be edited in house through web publishing software.
3. Prepare an attractive print brochure.
4. Provide a system to allow workforce providers to send requests for updates to content, and perform weekly updates on an as-needed basis.

Implementing Entity:

Lead: Office of Workforce Development (OWD) within YCEA

Partner(s): York County Workforce Service Providers; York County Alliance for Learning (YCAL)

Strategy 1B: Conduct workforce forums with employers to stay aware of changing needs on an annual basis, and incorporate the workforce requirements of target industry clusters into forums.

Purpose: To keep abreast of emerging trends and challenges in terms of workforce needs of local employers, with particular attention paid to target industry employers.

Approach:

1. Working with other YCEA staff, continue to identify specific employers to target with workforce forums, which ideally would include employers representative of top target industry clusters and employers known to be interested in workforce development issues as a result of business retention and expansion visits.
2. Define forum themes based on the known workforce requirements of the target industries, as well as common workforce issues raised by employers.
3. Identify local experts from the workforce services network to sit on an expert panel as part of the workforce forum.
4. Appoint a facilitator (YCEA staff, a volunteer, or a paid facilitator) to conduct the forum.
5. Record key topics and ideas raised during the forum and prepare a summary document that may be circulated amongst the workforce service providers network to increase awareness of emerging issues.

Implementing Entity:

Lead: OWD

Partner(s): Workforce Service Providers, Area Employers; YCAL

Strategy 2: Develop networks for a young workforce

Purpose: To create networks oriented to building the capacity of young entrepreneurs and business leaders.

Approach:

1. Continue to engage the existing networking groups for young business leaders to ultimately strengthen the workforce and community.
2. Continue to support the SCORE/Alliance Roundtable Program to mentor entrepreneurs and young business leaders, and current business owners with a supportive peer group.
3. Continue to support Leadership York's programs whose mission is to train and support individuals who have the desire to serve York's community in leadership positions.
4. Continue to facilitate partnerships between the education and business communities through YCAL and their Mentoring Program.

Implementing Entity:

Lead: YCEA

Partner(s): York Young Professionals, York SCORE, Leadership York

Strategy 3: Form a public education advisory group to serve as advocates for K-12 education.

Purpose: To serve as advocates for the integration of science, technology, engineering and mathematics into public education and for more efficient school systems.

Approach:

1. Create a working group focusing on science, technology, engineering and mathematics (STEM) education to help prepare students for careers in innovative fields that builds from the Office of Workforce Development Advisory Group within YCEA and the York County Alliance for Learning.
2. Continue to monitor the potential for a charter school in the County of York using the STEM curricula as its focus in order to offer a strong differentiation from regular schools.

Implementing Entity:

Lead: YCAL

Partner(s): YCEA, Higher Education Institutions, Local School Districts, Local Foundations

Strategy 4: Market and support the development of quality of life amenities to capture young workforce and compete for creative class, and develop a marketing campaign devoted to advertising York County's attractions, diversions and strengths to attract residents, visitors, investors, and the workforce in target industries, primarily through web media.

Purpose: Quality of life is linked to an innovation economy, and marketing of an area's top quality of life factors are an important aspect toward building a strong workforce. Quality of life is a broad term that encompasses the intangible and tangible factors that make an area a desirable place to live. These factors may include recreational offerings, scenic rural and natural environments, lively downtowns, arts and cultural activities, and a diverse housing stock, which ultimately lead to quality of place.

Approach:

1. Building from the York County Profile prepared by YCEA, maintain a series of web pages that provide graphic, appealing and easy-to-navigate content describing housing, healthcare, cost of living, recreational offerings, and other quality of life factors, as well as information on the County's demographic and economic characteristics. Incorporate information from (or links to) demographic information prepared by YCPC and other demographic information resources.

2. Continue to update the descriptions of types of employers in key occupations needed to support target industries, including architects, engineers and healthcare workers.
3. Maintain a series of web pages focused primarily on attracting the young workforce that offers tips on job searching, a cost of living calculator (to demonstrate the cost benefits of staying in York County after graduation or returning after college), and that allows employers to post externship, internship and shadowing opportunities on the site.
4. Perform annual updates to the site's content upon updates to the York County Profile.
5. Form a marketing campaign with articles in national publications, outreach to national television, and regional/mid-Atlantic publications and broadcasts.
6. Develop a strategy to involve the YCEA's OWD in the York City business recruitment and expansion process.

Implementing Entity:

Lead: YCEA

Partner(s): Creativity Unleashed, York City

9.3 Growth Area Strategies

In each of York County's five planning regions, managing growth was cited as a major vision element. Steps to balance residential growth with commercial and industrial growth and steps to focus growth to areas with existing infrastructure are necessary. The following strategies outline actions related to managing growth.

Strategy 1: Provide sample code language and information outreach to educate and assist communities on regulatory options available to manage growth through the Municipal Consulting Program.

Purpose: To encourage local municipalities to make informed decisions about the types of regulatory techniques they will use in their individual jurisdictions with respect to growth management.

Approach:

1. Continue to offer sample intergovernmental agreements to municipalities wishing to work together to develop a multi-municipal comprehensive plan.
2. Educate communities on proper zoning and land use opportunities needed to attract desired businesses.
3. Continue to provide sample model ordinances for solar, wind, and thermal energy alternatives.

4. Research sample zoning language to address green building programs for the review and possible adoption by local municipalities (e.g. LEEDS). Aspects of a local green building program may include the adoption of an ordinance with associated guidelines and a point system for green construction. In exchange for adherence to the guidelines and scoring of a pre-set number of points, developers may be granted incentives such as bonus density, reduced setbacks, reduced parking requirements, or other incentives that reduce the overall cost of development.
5. Work with the Smart Growth Coalition of York and Adams Counties to market the *Traditional Neighborhood Development Ordinance Handbook*. The handbook provides a range of densities suitable for different downtown contexts, making it a valuable resource for any municipality interested in co-locating residential and commercial uses. Traditional neighborhood development techniques can result in more balanced residential and commercial development and increased densities which make service delivery more efficient.

Implementing Entity:

Lead: YCPC

Partner(s): York/Adams Smart Growth Coalition, York County Zoning and Building Permit Officials Association, YCEA

Strategy 2: Undertake corridor redevelopment and revitalization plans to identify corridor specific marketing themes/niches and revitalization strategies.

Purpose: To develop strategies for individual corridors based on focused analysis of existing conditions and opportunities.

Approach:

1. Work with local municipal officials to review the maps and database of sites for development, prepared as part of the Economic Development Plan process, and use as a screening method to identify potential corridors for further planning. Use the York Envisioned Scenarios 2040 Study as a reference and beginning point for discussions.
 - a. One potential example (as a result of input from the November regional municipal work sessions) would be to market the growth area in the South Eastern region along Route 74 as a small-scale medical and community service center within the Established Secondary Growth Area.
 - b. An existing example is the plan prepared for the Codorus Corridor.
2. Provide technical assistance to municipalities that choose to embark on the development of corridor redevelopment or a revitalization plan.
3. Include a detailed market study of potential uses for the corridor, conceptual design, recommended marketing themes/niches and revitalization strategies. The evaluation

of potential uses should include office, retail and industrial, which are the focus of this Economic Development Plan. Additionally, synergistic relationships provided through residential uses, including senior housing to understand opportunities related to the aging of the population in the nearby Baltimore region should be considered.

Implementing Entity:

Lead: YCEA, YCPC

Partner(s): Local Municipalities

Strategy 3: Track and monitor growth of households and jobs and availability of sites.

Purpose: To monitor and compare trends in growth and resulting development of sites for economic development to determine if sites identified through the York County Economic Development Plan are being developed prior to other sites.

Approach:

1. Continue to participate as a State Data Center Affiliate to stay aware of existing population growth and other Census Data.
2. Expand use of GIS to track and monitor growth and availability of sites:
 - a. Review the database of sites produced as part of the York County Economic Development Plan as a base.
 - b. Perform annual updates and calculate statistics on the percentage of sites developed in the database to track growth trends and determine if sites most suitable for economic development are being developed.

Implementing Entity:

Lead: YCPC

Partner(s): YCEA

Strategy 4: Assess the local Subdivision and Land Development Ordinance (SALDO) plan review and approval process to better York County's economic development opportunities.

Purpose: To develop a best practice sample process with information regarding local and State best practices in order to address cumbersome processes.

Approach:

1. Review cross section of municipal subdivision and land development processes to arrive at best practices.
2. Develop a list of SALDO BMP's used.
3. Promote consistency in the SALDO process.

Implementing Entity:

Lead: YCPC

Partner(s): York/Adams Smart Growth Coalition, York County Zoning and Building Permit Officials Association

Strategy 5: Infrastructure planning considerations to support economic development.

Purpose: To incorporate infrastructure considerations in planning activities and provide information to developers and companies interested in development of parcels.

Approach:

1. Add utility service area boundaries with contact information on applicable utility providers (i.e. providers of water, sewer, gas, electric, and data) to the GIS database of available and suitable sites for economic development. Provide this information to developers and companies so that they will be able to then connect directly with the appropriate utility provider. Such a centralized source of information would help developers and companies know who to work with for each parcel, which would help them navigate the fragmented system of utility providers that service York County. Perform periodic (annual) updates to this information.
2. Collaborate with utility companies on expansion of service areas.
3. Use the economic development opportunity sites as a factor in prioritizing transportation elements in the Annual Report on Congestion.
4. Plan to periodically update the evaluation of economic development opportunity sites to incorporate information on congested transportation elements identified in the County's Annual Report on Congestion.
5. Work with utility companies to install and/or upgrade transmission speeds, install high-speed internet to establish high data transmission speeds, and foster growth of internet connected communities.

Implementing Entity:

Lead: YCPC

Partner(s): YCEA

9.4 Rural Area Strategies

Rural areas offer strong potential for agriculturally related economic development. For these areas, actions to enhance the viability of agriculture, to protect agriculture, to provide awareness to new economic opportunities for farmers, to expand agritourism, and to support agriculturally-related businesses are offered.

Strategy 1: Provide information outreach on agriculturally-related programs and resources as part of economic development marketing and informational materials, including YCEA website.

Purpose: To increase awareness of agriculturally-related economic tools and resources.

Approach:

1. Coordinate with existing agricultural resources including the York County Agribusiness Council, Penn State Cooperative Extension, York County Agricultural Land Preservation Board, and Farm & Natural Land Trust of York County to prepare a list of available financial incentive, grant and assistance programs.
2. Coordinate with partner entities to hold a grants and incentives workshop describing resources and how to apply.
3. Maintain a web page on the YCEA website with a list of available grants and resources.
4. Continue working with existing agricultural resources to provide outreach to farmers to determine if there is interest in creating a farmer cooperative (particularly in the South Eastern planning region), including a workshop describing the benefits of cooperatives.
5. Continue to work with each municipality to review their Agricultural Security Area (ASA) and create an accurate ASA data layer in the County GIS system.
6. Continue to inform communities of potential to use transfer of development rights (TDR) programs, and offer sample language.

Implementing Entity:

Lead: York County Agricultural Land Preservation Board (YCALPB), YCPC

Partner(s): Farm & Natural Land Trust (FNLT), Penn State Cooperative Extension Service, York County Agriculture Business Council (YCABC), and YCEA

Strategy 2: Develop a strong local food system

Purpose: To enhance awareness of the option to buy local foods and support farmers in the process.

Approach:

1. Continue to support the YorKitchen initiative of YCEA and NutriCore NorthEast Inc. to allow farmers to perform value-add processes.
2. Create and grow “farm to” programs targeting chefs, restaurants, schools, and other institutions.

- a. Prepare a series of workshops for all above listed groups with tips on making the appropriate connections and overcoming barriers.
 - b. Promote farm tours as school trips or daycare trips.
 - c. Continue to support the Horn Farm Center for Agriculture Education for educational programs and agricultural tourism.
3. Continue to support farmers' markets, and provide a listing of markets along with a link through YCEA's website to the York Chapter of Buy Fresh Buy Local.
 4. Market these "farm to" connections to encourage consumers to buy local agricultural products and support restaurants, schools and farmers markets. Utilize the national branding efforts of the Buy Fresh Buy Local organization by partnering with the local chapter and the York County Food Alliance.
 5. Coordinate with partners and support initiatives which strengthen farming logistics, such as, transportation, sourcing, minimal processing, and disposal of excess to increase the amount of fresh fruits and vegetables available locally.
 6. Implement neighborhood serving, smaller scale retail expansion to address the day to day needs of residents in established boroughs and villages within the rural areas.

Implementing Entity:

Lead: York County Food Alliance (YCFA), YorKitchen

Partner(s): YCEA, FNLT, Penn State Cooperative Extension, York Buy Fresh Buy Local (BFBL), Horn Farm Center, YCABC

Strategy 3: Forge a strong agritourism strategy

Purpose: To understand existing offerings and opportunities in agritourism (i.e. activities on agricultural lands open to visitors) and support the industry's development.

Approach:

1. Work with existing agricultural resources (e.g. the YCABC, the Penn State Cooperative Extension and the York County Convention and Visitors Bureau) to promote opportunities for showcasing agritourism attractions, such as bed and breakfasts, wineries, corn mazes and hayrides.
2. Continue to host the annual Round-Robin meetings with municipal officials in rural areas to increase awareness of opportunities for agritourism development.
3. Maintain a web page to the YCEA website that describes agritourism opportunities and existing resources, such as winery tours, corn mazes, festivals, and pick your own as promoted by the Susquehanna Gateway Heritage Area (SGHA) and the York County Convention and Visitors Bureau (YCCVB).

4. Continue to coordinate with the marketing of “farm to” connections so that existing agritourism and agritainment uses are marketed alongside local food.
5. Promote heritage tourism through identification of heritage resources and encouraging submission of applications to the York County Heritage Program.

Implementing Entity:

Lead: YCEA, YCPC

Partner(s): YCABC, Penn State Cooperative Extension Service, SGHA, YCCVB

Strategy 4: Delineate a sustainable farming strategy

Purpose: To encourage local farmers to transition to sustainable agriculture through outreach and education.

Approach:

1. Coordinate with existing agricultural resources including the YCABC, Penn State Cooperative Extension, York County Conservation District (YCCD), YCALPB, Horn Farm Center, and the United States Department of Agriculture (USDA) to continue to distribute information on best practices in sustainable agriculture, and conduct a series of workshops with associated print materials. Workshop topics would include:
 - a. Transitioning to organic or sustainable agriculture.
 - b. Emerging practices to cut carbon emissions, which could eventually allow farmers to sell carbon credits if a cap and trade system is put into place in the United States (e.g. no or low till planting, tree plantings and conservation practices, and methane capture from dairy manure).
 - c. Recycling agricultural plastics at County Plastic Pesticide Container Recycling Program (PPCR) sites (GROWMARK FS, Inc. and John Deere Landscapes).
 - d. Continue to provide funding to local farm families through the YCALPB Conservation Easement Purchase Program to help sustain farm families and strengthen the agricultural community.

Implementing Entity:

Lead: YCCD, YCALPB

Partner(s): YCABC, Penn State Cooperative Extension, Horn Farm Center, USDA and YCFA

9.5 Downtown Revitalization

Vibrant downtowns through revitalization, adaptive reuse and infill, in the City of York and other municipalities, emerged as a goal in many planning regions. Strategies to attract businesses and customers to downtowns in furtherance of this goal are offered below.

Strategy 1: Expand a downtown-oriented economic development program within YCEA to serve as a resource and network builder.

Purpose: To increase outreach and education to downtown groups throughout the County on best practices in downtown revitalization.

Approach:

1. Designate a staff position within YCEA to serve as a downtown advocate, municipal consultant and network builder and prepare a description of responsibilities for the position. This position is housed within YCEA's Economic Development Department.
2. Maintain a targeted list of incentives and resources available for downtown adaptive reuse and other downtown projects (including partners, such as the York City Redevelopment Authority), and include that list on a web page and in a print brochure.
3. Continue to meet with municipalities and business groups interested in developing plans and goals based on local needs for downtown revitalization.
4. Share examples of successful downtown efforts in the County, including the experience of Downtown Inc. and Main Street Hanover.
5. Continue to assist interested municipalities and business groups in determining what organizational structure would be the best option to implement local downtown initiatives, which could vary by scale of community and interest of business owners from all volunteer business associations to formal Main Street programs with paid staff.
6. Encourage downtown organizations to incorporate agritourism in downtown revitalization efforts and to host downtown farmers markets.
7. Work with downtown organizations to develop unique branding messages, with a logo and color scheme applied to signage, brochures, directories, maps and banners. Develop marketing themes related to unique niches served by area businesses.
8. Encourage new downtown organizations to offer longer operating hours (at least until 8 pm) with special events (such as First Thursday, First Friday, Second Saturday) like those already held in downtown York and Hanover, and encourage new downtown

organizations to market and promote events through a variety of media, from print ads to radio, social media, email, and web content.

9. Encourage new downtown organizations to recruit volunteers to help with special events planning and special initiatives.
10. Continue to educate local, State, and Federal lawmakers about the importance of core communities, and encourage government investment in our communities.

Implementing Entity:

Lead: YCEA

Partner(s): Local Municipalities, Local Non-Profits, Local Downtown Groups, Downtown Inc., York SCORE, Community First Fund, York City, and Main Street Hanover.

Strategy 2: Develop and provide sample code language to address downtown-specific issues.

Purpose: To increase awareness among local municipalities of potential regulatory approaches relevant to downtown issues.

Approach:

1. Coordinate with the YCEA downtown economic development staff to learn about improving downtown issues over time and continue to prepare sample language with the help of partners on an as-needed basis. Including, but not limited to:
 - a. Sample mixed-use zoning provisions.
 - b. Outdoor dining ordinance.
 - c. Retail signage provisions (including sandwich board provisions).
 - d. Architectural design guidelines.
 - e. First floor overlay zones (which could limit first floor uses in designated areas to retail uses only).
 - f. Building size for infill projects (some communities limit building size to encourage smaller-scale retail development).
2. Work with the Smart Growth Coalition of York and Adams Counties to market the *Traditional Neighborhood Development Ordinance Handbook*. The handbook provides a range of densities suitable for different downtown contexts, making it a valuable resource for any municipality interested in co-locating residential and commercial uses. Traditional neighborhood development techniques can result in more balanced residential and commercial development and increased densities which make service delivery more efficient.

Implementing Entity:

Lead: YCPC, York City

Partner(s): YCEA, Local Municipalities, Local Downtown Groups, Smart Growth Coalition of York/Adams Counties, Neighborhood Associations, and the Pennsylvania Downtown Center.

Strategy 3: Undertake downtown plans that identify marketing niches/themes and revitalization strategies through partnerships between the YCEA downtown economic development staff and local downtown groups.

Purpose: To develop strategies for individual downtowns based on focused analyses of existing conditions and opportunities.

Approach:

1. Undertake retail and office market studies to determine appropriate niches for various downtowns given their existing strengths. Potential niches could include arts and entertainment, antiques, restaurants and crafts, legal, healthcare, and co-working. The evaluation of potential niches also considers opportunities to integrate agritourism and heritage tourism with downtown revitalization activities:
 - a. Identify the potential market support provided by residents, offices and services to support retail development (area residents and employees are the primary sources of spending for retailers, though tourists can serve to supplement these customers), including analysis of opportunities to capture young residents to support the workforce and retirees given aging trends in the region (as well as seniors' interest in heritage tourism).
 - b. Consider each downtown's ability to provide attractive services for the workforce: day care facilities, elder care facilities, and affordable/workforce housing.
 - c. Determine additional options for college students and employees, in regards to eateries and shopping, while encouraging existing businesses to expand their hours to accommodate this demographic.
2. Continue to study and invest in wayfinding programs to identify gateways and attractions and provide corresponding signage treatment to help visitors navigate downtowns.
3. Analyze and invest in beautification programs to create gathering spaces, enhance the facades of storefronts, provide street furniture and greenery, and call attention to community assets.
4. Continue to partner with Downtown Inc. on the Moving Plans into Action initiative.
5. Commission an architectural study for the Hanover Heritage Conference Center.

6. Develop a strategy to incorporate the widespread growth of Wellspan into downtown York City.

Implementing Entity:

Lead: YCEA

Partner(s): Local Municipalities, YCCVB, YCPC, Moving Plans into Action, Pennsylvania Downtown Center, York City, Downtown Inc., Main Street Hanover

9.6 Incentives and Economic Development

In addition to strategies focused specifically on the workforce, on growth areas, on rural areas and on downtowns, strategies are needed to enhance other economic development activities. These strategies include those that inform businesses of existing local and State resources that educate existing firms about opportunities to transition into high-growth industries, that advertise available and suitable sites for development and adaptive reuse, and that create incentives for top target industry activities.

Strategy 1: Expand information outreach to communities regarding existing incentive and assistance programs (e.g. LERTA, brownfields funding, Pennsylvania incentives for renewable energy development, technical assistance available through YCEA and YCPC, etc.).

Purpose: To clearly convey information on the breadth of economic programs provided through County, regional, State, non-profit and private sources.

Approach:

1. Maintain a database of available incentive and assistance programs with identification of relevant target industries.
2. Maintain an attractive, easy to navigate site that lists current incentive programs and other funding resources.
3. Provide an information request form along with contact information to allow businesses to send requests for additional assistance understanding programs.
4. Continue to offer a primer on available incentive and assistance programs to local municipalities and provide periodic updates in different planning regions.

Implementing Entity:

Lead: YCEA

Partner(s): YCPC, Local Municipalities

Strategy 2: Educate businesses and communities with regards to expanding industries and opportunities to transition into emerging fields.

Purpose: To create interest in emerging industries amongst existing firms and local municipalities.

Approach:

1. Prepare materials informing firms about opportunities to transition into emerging industries, including the renewable energy sector, using the information presented in the business assessment section of the York County Economic Development Plan as a base.
2. Incorporate information on expanding industries and opportunities to transition in business retention visits.
3. Continue to update the York County Community Profile with updated information on the demographics of the local industries.

Implementing Entity:

Lead: YCEA

Partner(s): OWD, Local Developers

Strategy 3: Create renewable energy related incentives for retro-fitting existing buildings and for development of renewable energy resources as infrastructure to support other industries' growth.

Purpose: To stimulate local activity in the renewable energy sector.

Approach:

1. Continue to administer the Weatherization Assistance Program to reduce heating and cooling costs for low income persons.
2. Continue to maintain the scoring criteria for administration of grants (e.g. jobs created or retained, grantee match, etc.).
3. Publicize incentives through the website inventory of incentives, through print materials and through description during presentations about target industries.

Implementing Entity:

Lead: YCPC, Pennenergy, and the Manufacturers Association

Partner(s): Pennsylvania Office of Energy and Technology Development, Pennsylvania Department of Community and Economic Development, Pennsylvania Department of Environmental Protection

Strategy 4: Coordinate an expanded database of sites for economic development and market alongside demographic and economic data

Purpose: To focus on more comprehensive and coordinated access to site information.

Approach:

1. Continue to have a working group within YCEA of individuals that are involved in business attraction, retention and expansion.
2. Continue to utilize the identified key data/building and site characteristics most frequently requested by relocation and expansion clients, which could include: building class, available space, floor plate and column spacing, rent, average utilities, address, special features, parking, security, etc.
3. Continue to maintain YCEA's Industrial Park Directory and internal inventory of sites.
4. Continue to utilize the software programs available to identify the specific characteristics for sites and include all adaptive reuse, infill and industrial park properties, and designate downtown nodes and corridors as "business parks" to give them equal weight and attention against traditional suburban business parks.
5. Continue to market the sites directly to site selection consultants and regional commercial brokers via the web in order to enhance potential for retail recruitment.
6. Include links to and from the demographic, economic, and quality of life information prepared as part of the workforce development strategy to market quality of life amenities.

Implementing Entity:

Lead: YCEA

Partner(s): YCPC, Local Brokers



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Economic Alliance
Chamber of Commerce & Economic Development Corp.

